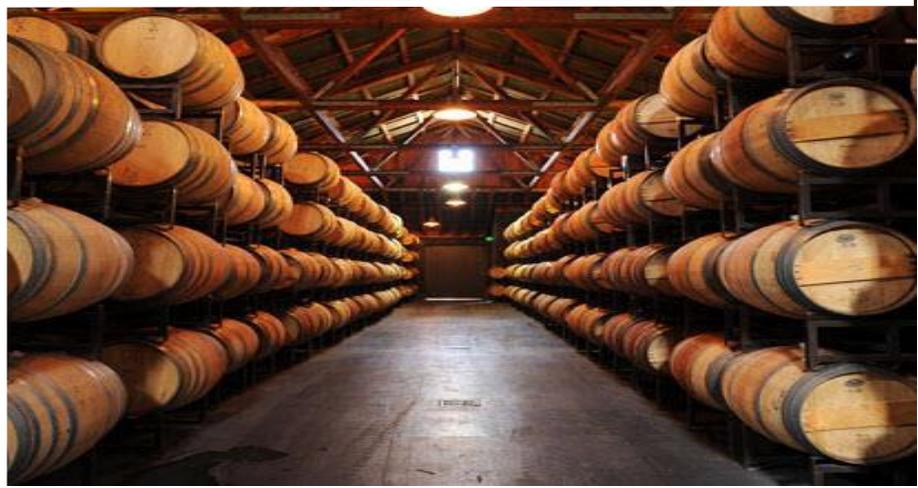
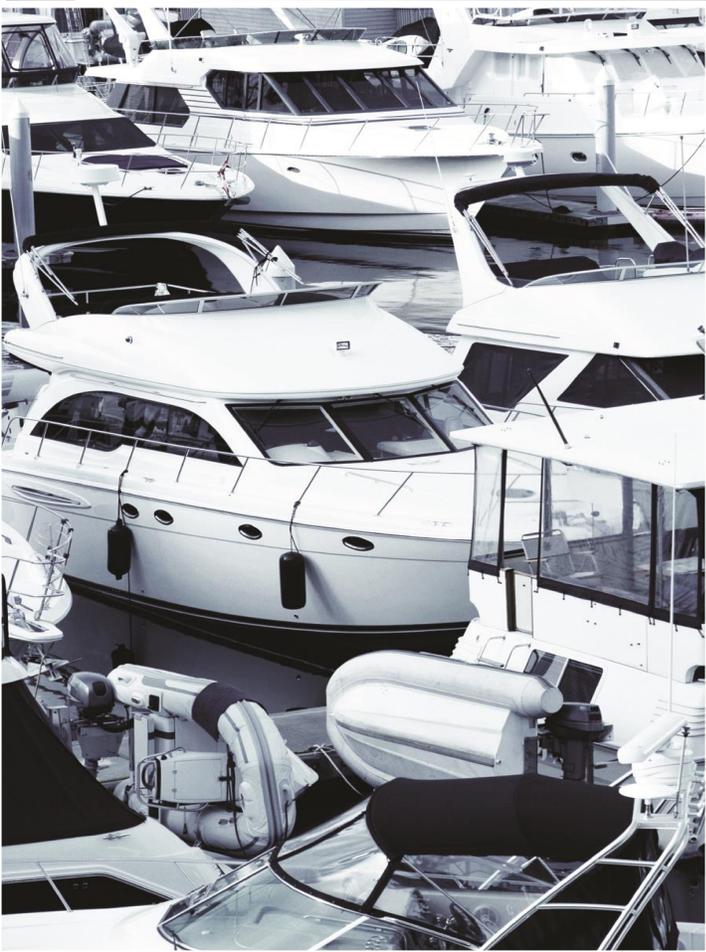


STORAGE COMMANDER

Facility Operations Manual



Welcome to Storage Commander

Welcome to Storage Commander, the most powerful and easiest-to-use self-storage management software available. Our software was developed exclusively for the self-storage industry, Storage Commander was designed using the latest Windows 32 and 64bit graphical operating system architecture, and incorporates many features not found in any other management program.

This manual will help you to quickly get started with Storage Commander. We strongly recommend that you start with Section 1, *Exploring Storage Commander*. This section will give you an overview of all of the individual functions, screens and parameters that affect the operations of Storage Commander.

Proceeding to Section 2, *Using Storage Commander*, will allow you to familiarize yourself with basic operations such as: move-in, move-out, adjustments, transfers, payments, as well as other standard operations self storage managers do on a day to day basis.

It is important to understand that even though these operations may be considered standard to all self storage facilities, not all stores operate exactly the same. For instance, some stores may charge rent on the first of the month, while others charge rent each month on the calendar day of the move-in (Anniversary date). Some stores prorate unused rent at move-out and some will only allow prorated refunds if the customer gave notice within a predetermined time frame. The list of operational differences used throughout the Self Storage industry is extensive and, while Storage Commander can be configured to meet the operational requirements of your store, we strongly recommend that you take the time to review Section 3, *Installation & Setup*, to verify that Storage Commander is configured correctly for your facility.

We're available to help you with any questions that you might have with using Storage Commander. Our software comes with 60 days free technical support that is available from 7:00am to 5:00pm Monday through Friday Pacific Standard Time. We also offer additional support at reasonable rates after the initial 60 days have expired.

If you have any ideas on how to improve Storage Commander, please call us. We are always happy to discuss new features with our customers.

Thank you,

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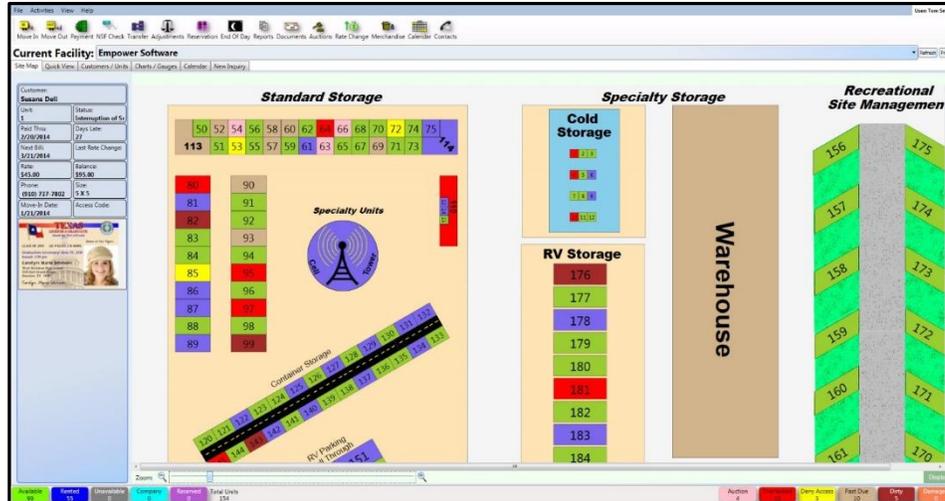
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Facility Operations Module

The Storage Commander facility management system is comprised of two separate modules, the Storage Commander Facility module, used by the on-site facility management team, and the Storage Commander Configurations module, used by corporate and district management to configure and or modify the operational configuration of the Storage Commander facility module. To learn more about using the Storage Commander Configuration Manager module, please refer to the Storage Commander Configurations Manager manual.

Site Map

The Site Map is a feature rich and extremely powerful feature of the Storage Commander V5 program. Read through this section to gain imported information on how to use this feature.



Click the **Site Map** Tab to access the facility map.

- ❖ Notice that the **Colors** in the map correspond to the **Colors** on the **Legend Bar** located at the bottom of the site map screen. The features associated with the legend bar are explained later in this manual.
- ❖ The **Zoom Bar** at the bottom of the map can be moved left and right to Zoom in and out of the map
- ❖ The **Scroll Bars** on the Left Side and bottom of the Screen give you the option of scrolling around on the screen.
- ❖ If you **hover the mouse** over a unit, it will display the following

- Customer Name
- Unit Number
- Paid Thru Date
- Next Bill Date
- Unit Rental Rate
- Phone Number
- Move In Date
- Late Status
- Days Late
- Last Rate Change
- Unit Balance
- Unit Size
- Access Code
- ID Picture



Customer: Susans Deli	
Unit: 1	Status: Interruption of Se
Paid Thru: 2/20/2014	Days Late: 27
Next Bill: 3/21/2014	Last Rate Change:
Rate: \$45.00	Balance: \$95.00
Phone: (910) 737-7802	Size: 5 X 5
Move-In Date: 1/21/2014	Access Code:
<p>CLASS OF 2007 UK #16AD-2-R-8091 Graduation Ceremony/ June 02, 2009 Issued: 3.30 pm Carolyn Marie Johnson West Kildwick High School 105 East Grand Street Houston, TX 77002 Carolyn Marie Johnson</p>	

- ❖ Double clicking a **Rented** unit on the map will launch the payment screen.
- ❖ Double clicking an **Available** unit on the map launches the Move-In screen.
- ❖ Right clicking on a **Rented** unit will open a menu box allowing you to open the customers details screen or process a payment on the unit.

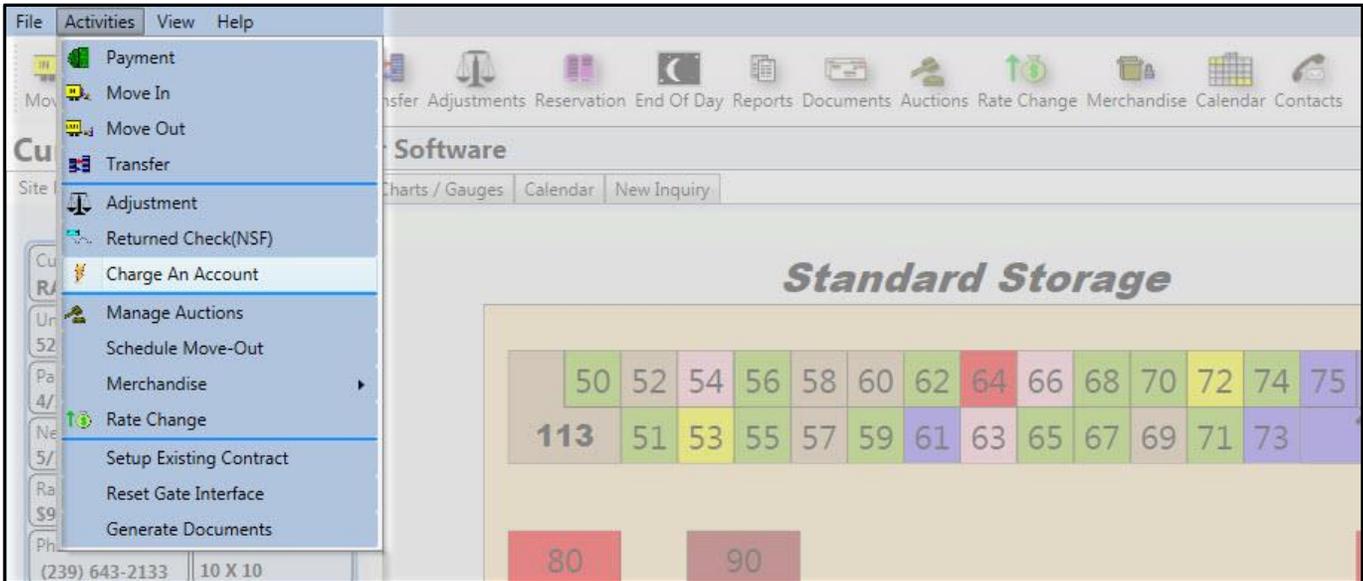
Tool Bar & Pull Down Menus



Tool Bar

The Tool Bar allows access (depending on security settings) to all standard functions available in the Storage Commander V5 program. To access a particular function, click on the icon associated with the function to initiate the process

Pull Down Menus



Using the pull down menus is another way to access the various features found in Storage Commander. Depending on the security access level of the user virtually all of the functions contained in the program can be accessed through the drop down menu system. To use the pull down menu system, click on any one of the four main menu selections **File**, **Activities**, **View** & **Help** and select from any of the sub titles contained in the pull down list.

Legend Bar



The legend bar provides valuable information as to the status of both general and occupied unit status. The left side of the legend bar displays 5 buttons giving a count of Available, Rented, Unavailable, Company and Reserved units, while the right side of the legend bar displays 6 buttons listing units/customers that are in a late status as well as units that require special attention. Click on the appropriate button in the legend bar to open a list showing the units that require special attention (**Dirty** / **Damaged**) or to see what customers are in late steps that require special attention or customers who have not paid their rent yet (**Past Due**), but are not in a late step.



Quickview Window

Click the **Quick View** Tab to access the **Quick View** window

The Quick View feature provides a view of critical customer accounts, unit action items and daily receipt totals.

The screenshot shows the Storage Commander Quick View window for 'Empower Software'. It features several sections:

- Reservations:** A table listing reservations with columns for name, unit, and planned move-in date. A callout box labeled 'Change Multiple Units' points to the 'Move In' button for the 'Fenton Filmore' reservation.
- To-Do List:** A list of tasks such as 'Unit 143 needs to be inspected' and 'Unit 176 needs to be inspected'. A callout box labeled 'Change Multiple Units' points to the 'Change Overlock' button.
- Late or Past Due Contracts:** A table listing contracts with columns for name, phone, date, and unit.
- Contacts List:** A table listing contacts with columns for name, phone, size, and follow-up date.
- Scheduled Move-Outs:** A table listing move-outs with columns for name, phone, date, and unit.
- Today's Receipts:** A table listing receipts with columns for item, amount, and type.

At the bottom, there is a status bar with various indicators and a total of \$447.80.

The **Reservation** section of Quick View shows the units that are currently reserved at your facility, along with the **Planned Move-In Date**.

The Reservation section of the Quick View screen lists all active reservations. From this list you can **Move-In** or cancel a **Reservation**

This close-up shows a reservation for 'Romona Snowflake' with 'Unit: A28' and a 'Planned Move-In: 1/22/2013'. The 'Move In' and 'Cancel' buttons are highlighted with arrows.

Convert a reservation to a **MOVE IN** or **CANCEL** an active reservation

The **Contacts List** displays a list of all open prospects, who have contacted the facility and expressed an interest in renting a space. Double clicking on a prospect opens up the Contacts section and allows you to manage the follow-up process.

The Contacts List shows the following prospects:

Name	Size	Follow-Up
Elsworth, Judy	Size: 10 X 10	Follow-Up: 1/22/2013
Loudtalker, Richard	Size: 5 X 10	Follow-Up: 1/31/2013
Shiftshank, Roger	Size: RV Parking	Follow-Up: Call
Snowflake, Romona	Size: 10 X 20	Follow-Up: Call

The **Late or Past Due Contract** section shows you the delinquent units at your facility. If you want more information on a specific contract, double click on the name to launch the Contract Details screen. Note that the colors correspond to the colors in the legend bar at the bottom of the screen. Just for reference here is what each color means.

Pink – Auction Status

Red – Overlocked: Customers who have entered into a late status that requires their storage unit to be over locked.

Brown – Past Due (Not in a Late Status).

Yellow – Deny Gate Access: Customers gate codes will not open the gate while in this late step.

Late or Past Due Contracts						
ERICKA ELIAS	(999) 393-9394	PT:5/05/11	Bal:\$60.00			PastDue
JIM FORRESTER	(932) 948-5858	PT:4/22/11	Bal:\$100.00			DenyGateAccess
Dave Downey	(565) 666-6562	PT:4/12/11	Bal:\$300.00			QualifyForAuction
TONI FERRITI	(999) 090-9076	PT:4/21/11	Bal:\$80.00			DenyGateAccess
Julie Smith	(909) 838-3882	PT:4/01/11	Bal:\$230.00			QualifyForAuction
JAMES GARCIA	(859) 399-9294	PT:4/09/11	Bal:\$230.00			QualifyForAuction
Sam Johnson	(123) 123-1231	PT:3/27/11	Bal:\$129.00			DenyGateAccess
JOJO JUMPING	(838) 383-8383	PT:4/29/11	Bal:\$115.00			Overlocked

The **Scheduled Move-Outs** screen shows all of the Scheduled Move-Outs at your facility.

Click on an item in this list to edit or view the details of the scheduled move-out.

Click on the Cancel button to remove the customer from a scheduled move-out.

Scheduled Move-Outs				
A10	ERICKA ELIAS	(999) 393-9394	5/26/11	Cancel
C25	ANNIE ARCHER	(848) 488-8484	6/21/11	Cancel

The **To-Do List** shows you dirty units and units that need an over lock add or removed.

To clear a unit from a dirty status follow the instructions below:

Double click the unit

A dialog box will appear and ask you if the unit is clean. Click **Yes** to mark the Unit as Clean, and remove the unit from the list

To-Do List		Count: 1
Dirty	Unit A8 needs to be inspected.	
Change Overlock	Unit C24 needs overlock to be added.	Count: 1

To Change the Overlock status of a unit through the **To Do List** click on the **Change Multiple Units** button to select the units(s).

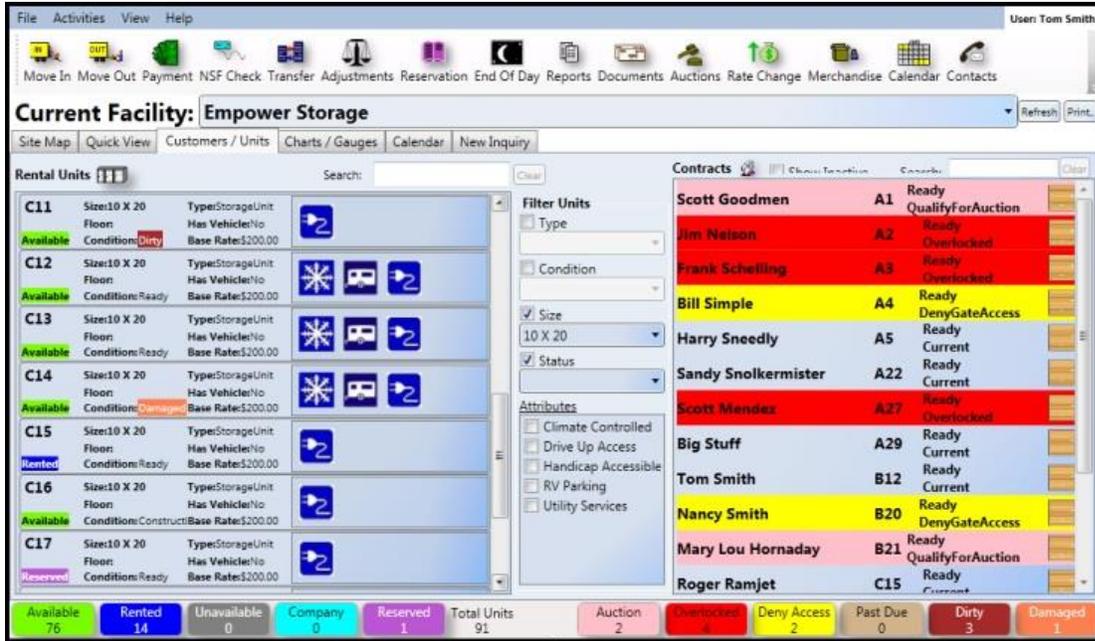
Change Lock Status		
<input checked="" type="checkbox"/> Add Overlock		Count: 5
<input checked="" type="checkbox"/> 131	JANNET CROOKER.	Overlocked
<input checked="" type="checkbox"/> 4	HATTIE BRODE	QualifyForAuction
<input checked="" type="checkbox"/> 54	GEORGE BARNS	QualifyForAuction
<input checked="" type="checkbox"/> 64	CHERYL MAY	QualifyForAuction
<input checked="" type="checkbox"/> 97	BRIAN PORTER	QualifyForAuction
<input type="checkbox"/> Remove Overlock		Count: 15
<input type="checkbox"/> 001	Susans Deli	Current
<input checked="" type="checkbox"/> 110	B & H Auto Parts	Current
<input type="checkbox"/> 122	WILLIAM CASHION	Current
<input checked="" type="checkbox"/> 129	JACOB CAMACHO	Current
<input checked="" type="checkbox"/> 140	VICTORA COTTON	Current
<input checked="" type="checkbox"/> 145	Desoto Used Stuff	Current
<input type="checkbox"/> 183	Shay M. Burton	Current
Update		Close

The **Today's Receipt** section displays all payment Transactions for the current day.

Today's Receipts			
Rent	\$112.50	Cash	\$157.50
Fee	\$45.00		
Total: \$157.50		Total: \$157.50	

Customer / Units Working Window

The Customer / Units Working Window is split into two columns, **Rental Units** & **Contracts** (Customers).

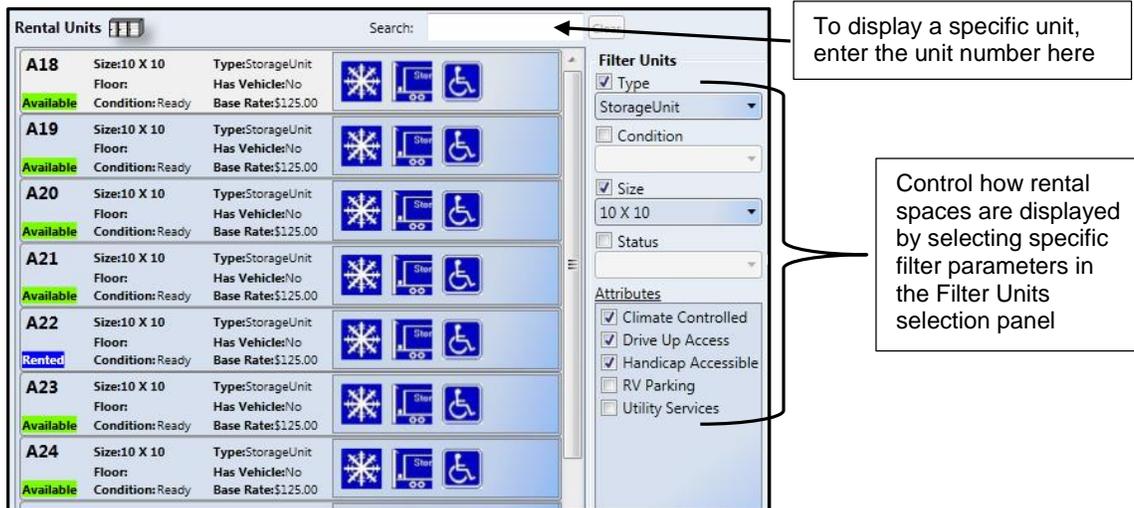


Rental Units column:

From the Customer/Units screen you can move customers into available units and make payments on existing customers.

The Rental Units column can be sorted by **Type**, **Condition**, **Size**, **Status** or **Attributes**. To set the sort criteria select how you would like the list sorted by clicking on the appropriate sort selection in the Filter Units selection panel.

Unit **Type**, **Size** & **Attributes** are created in the Storage Commander V5 Configuration Manager program



Contracts (Customers) column

The Contracts column of the Customer/Units screen allows access to account information for both **Active** customers and **Inactive** (moved out) customers. In addition you can also process payments, charge a fee, make account adjustments, reverse payments, transfer to another unit, or move the customer out, from this screen.

Managing a customer account through this screen is accomplished using the Right or Left mouse buttons. A detailed description of the functions of the Right & Left mouse buttons is described below:

Inactive (Moved Out) customers

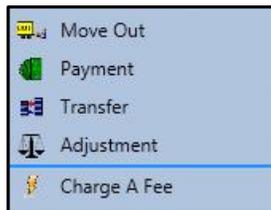
Customer Name	Unit Number	Status
BRANDI BEARTWELL	30	Ready
Fred-Freelancer	51	QualifyForAuction
RANDY JOHNSON	52	Ready
HAROLD BRAY	53	DenyGateAccess
GEORGE BARNs	54	Ready
Nancy-Renolds	55	QualifyForAuction
JEREMY ANTONIO	57	Ready
MAUD MONTGOMERY	58	DenyGateAccess
SILVIA J. AGUIRRE	60	Ready
LINDA COTTRELL	61	DenyGateAccess
GERALD CORTEZ	63	Ready
CHERYL MAY	64	Current
ANNIE A. ARCHER	66	Ready

Selecting Inactive (Moved Out) Customers

To select customer who have moved out of the facility click on the Show Inactive selection box to add customers who have been moved out to be added to the list. These customers will be identified by a line drawn through their name.

Changing a customer account using the Right Mouse Button

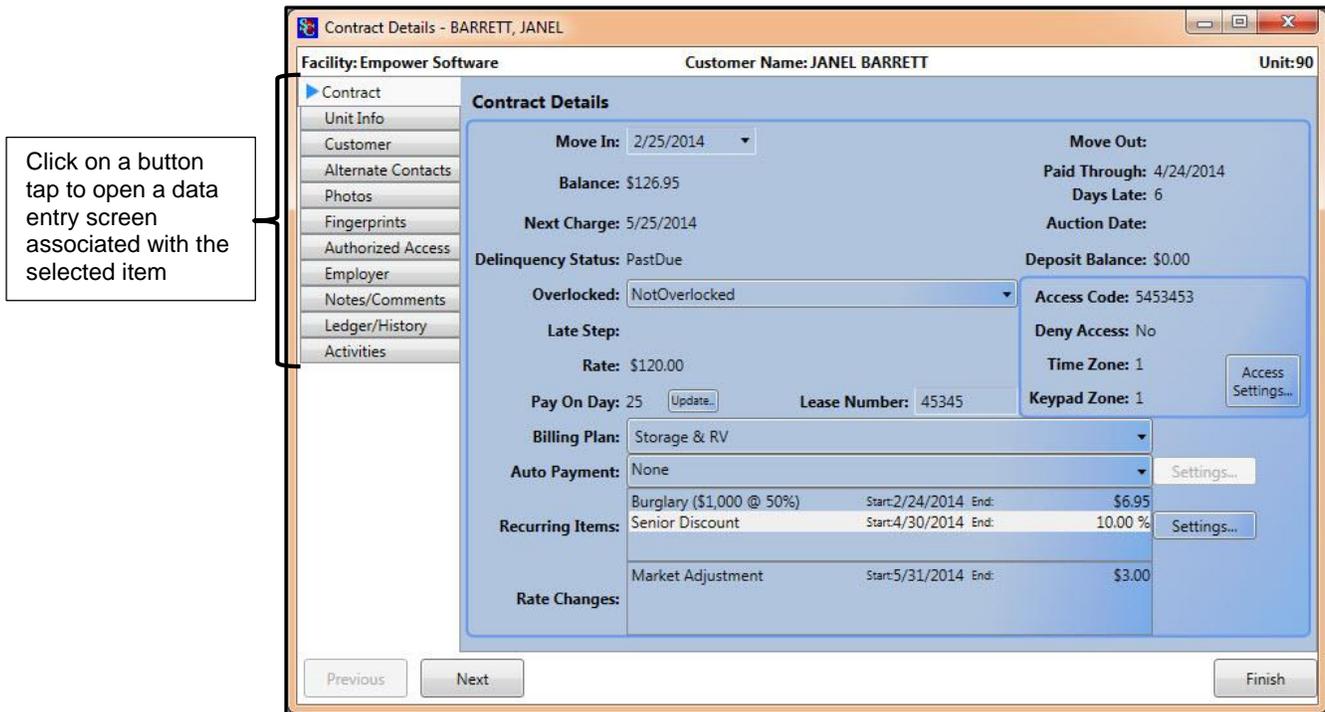
Clicking on a customer name with the right mouse button opens a window containing the most common customer management functions. From here you can:



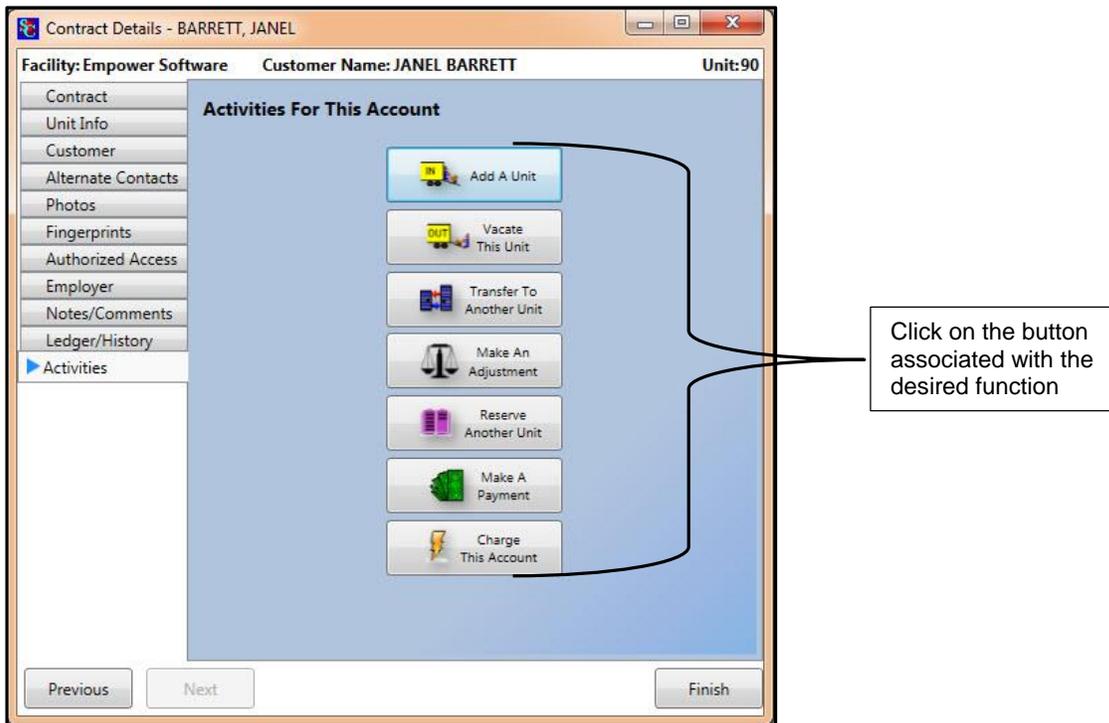
- ❖ Move a customer out
- ❖ Process a Payment
- ❖ Transfer the customer to another unit
- ❖ make an Adjustment to the account
- ❖ Charge a fee to the customers account.

Changing a customer account by double clicking using the Left Mouse Button

This will open the **Customer Detail** window, allowing you to modify the customers contact information, enter notes, alerts or comments to the account, open the customer ledger to view transaction history, or open the Activities window where you can; Add additional units to the customer, Vacate a unit, Transfer to another unit, Make an Adjustment, Reserve a unit, or make a Payment.



The Activities button allows additional transactions to be processed to the selected customer. From this screen you can quickly get to transactions that are commonly used on a day to day basis



Making a Payment



Payments can be processed in several different ways depending on user preference. Regardless of the payment method you use to identify the customer, the actual payment process remains the same.

The Storage Commander payment function supports Cash, Check, Credit Card & Debit Card payments. Payments can be posted to an account to pay for past due balances, as a pre-pay credit or as a partial payment. Billing plans can be configured to allow rent payments by the Week, Month, Quarterly, Semi-Annual or Annual. Refer to the Configuration manual for information on how to setup a billing plan.

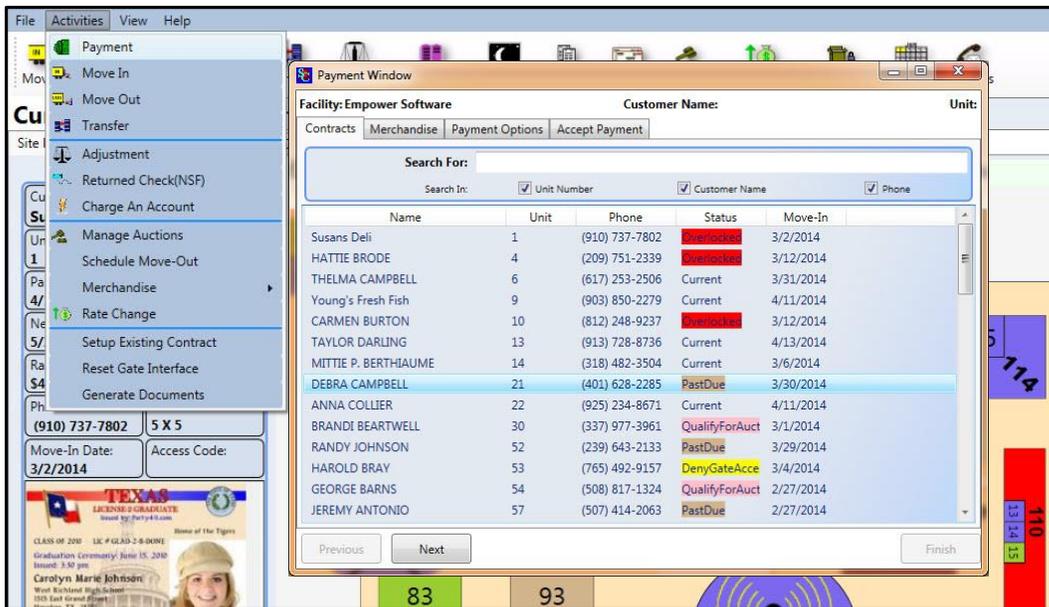
There are five (5) ways to process a payment on a customer account. You can choose from any of the 5 methods that you feel most comfortable with. All 5 methods work the same way and will deliver the same result.

We will start by showing you the location and how to start the payment process for each of the six payment methods.

Payment Methods

Using the Activities pull down menu:

Click on the **Activities** pull down menu item located at the top of the Storage Commander main screen and select **Payment** from the list.

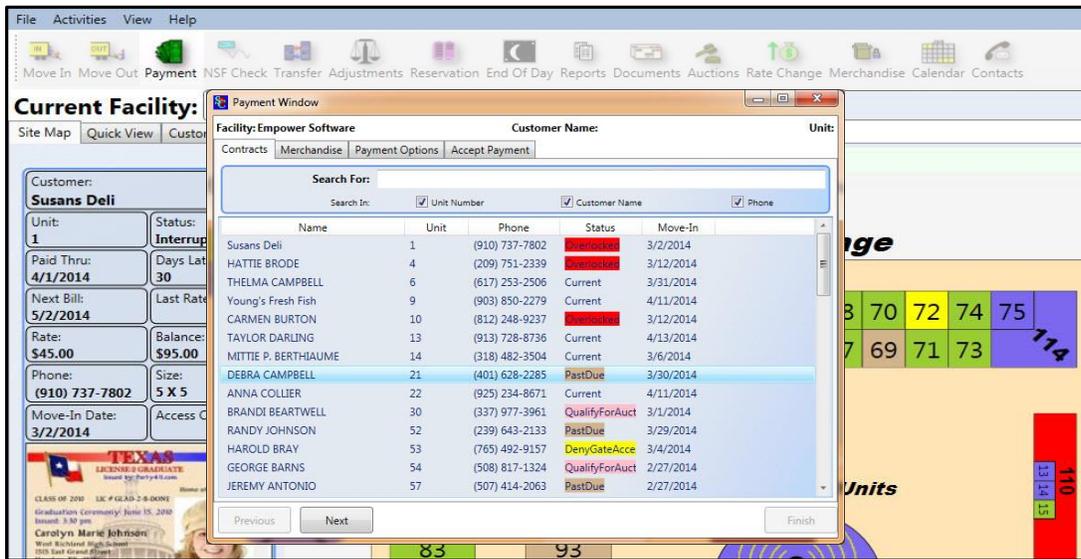


A customer can be located by searching through the customer list box, or by placing a check mark in the **Unit Number**, **Customer Name** or **Phone** and entering the associated search information in the **Search For** field.

Using the Toolbar payment icon

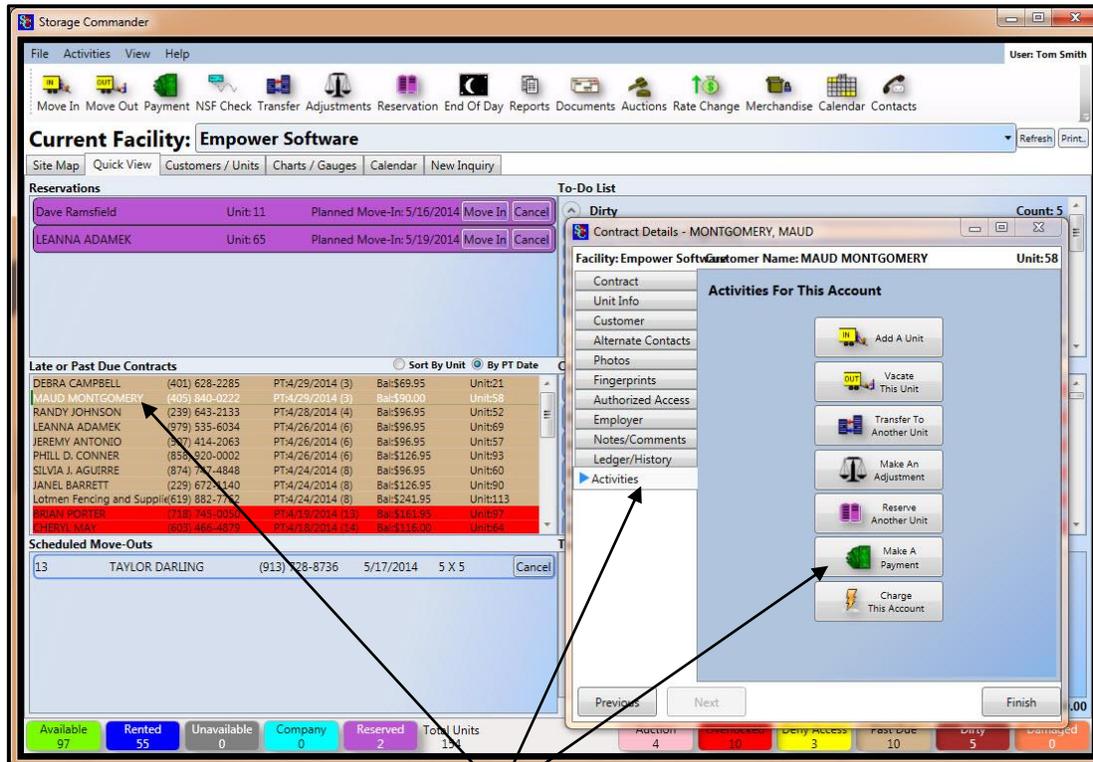
Click on the Payment icon in the Toolbar and select the customer from the Contacts list.

A customer can be located by searching through the customer list box, or by placing a check mark in the **Unit Number**, **Customer Name** or **Phone** and entering the associated search information in the **Search For** field.



Using the Quick View screen

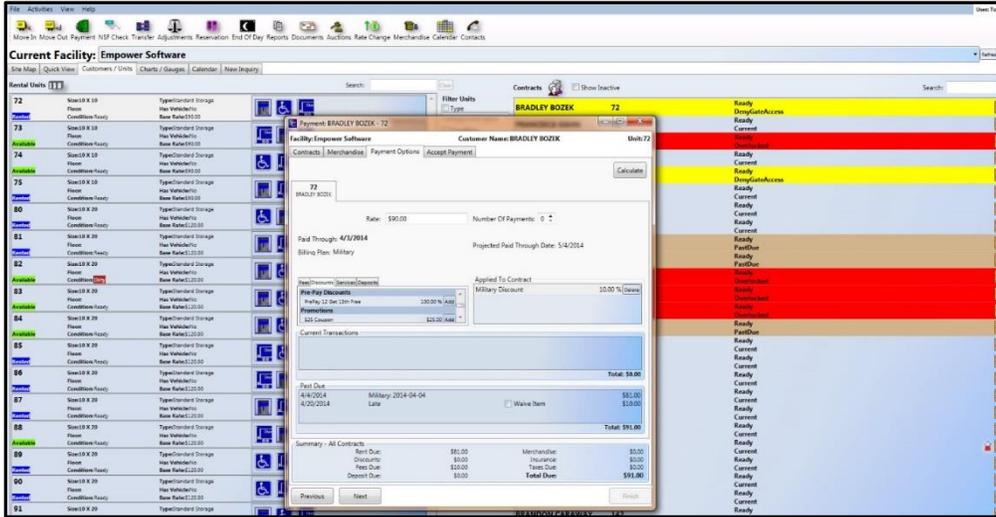
The Quick View screen will list all customers who are in a late status. To make a payment on a customer through this screen, double click on the customer name to open the Contract Details screen. From the Contract Details screen click on the **Activities** button, now click on the **Make A Payment** button.



Double click on the customer name and select Activities / Make A Payment

Using the Customers / Units screen

The Customers / Units screen is split into two sections Rental Units and Contracts (Customers). A payment can be initiated by either double clicking on an occupied unit under the **Rental Units** column, which will open the **Payments Options** screen, or by double clicking on a customer under the **Contracts** column, which will open the **Contract Details** screen, click on the **Activities** button followed by the **Make A Payment** button to open the **Payment Options** screen.



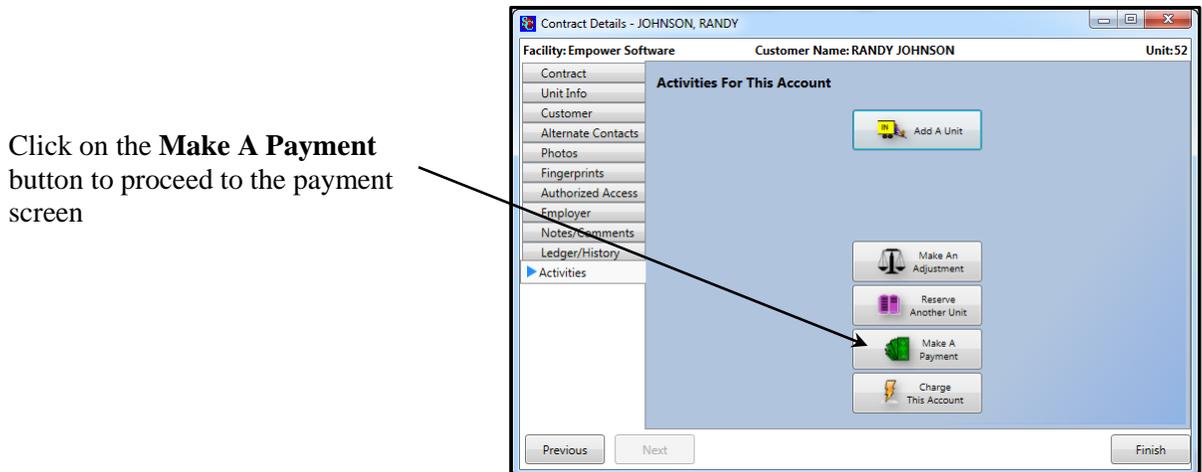
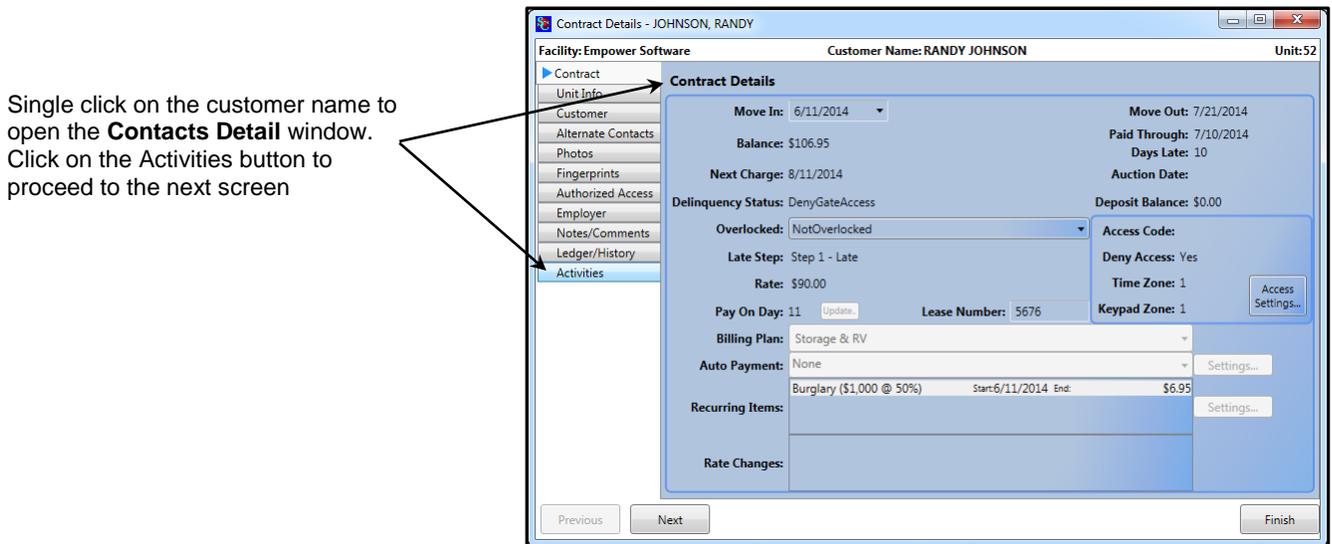
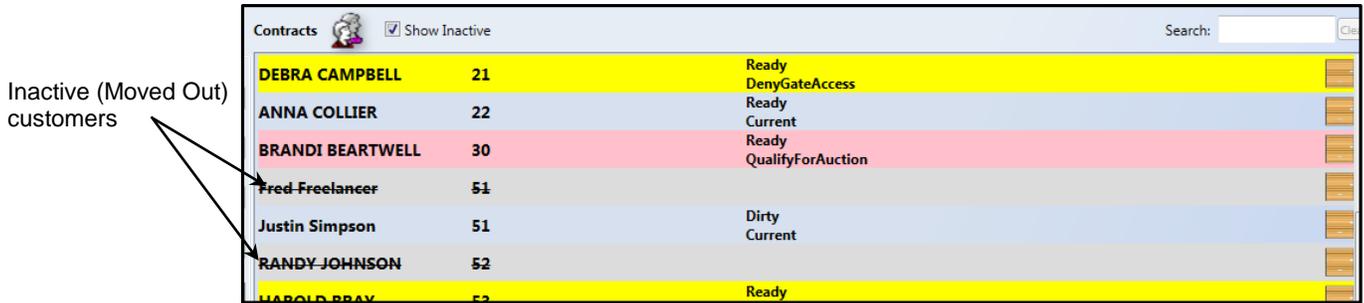
Using the Site Map.

To use the site map for processing a rent payment, locate the customers unit on the site map and double click on it to bring up the **Payment Options** screen



Paying on an Inactive (Moved Out) Customer

To enter a payment on a customer who has moved out of the facility, click on the **Customer / Units** tab, select **Show Inactive** and locate the customer in the contacts list (inactive customers can be identified by a line through their name). Inactive customers will be sorted in this list by the unit number they occupied prior to being moved out. Click on the customer name to open **Contract Details** and select the **Activities** button. If the customer was moved out with a balance due there will be a button **Make A Payment** available in the **Activities For This Account** screen, click on the **Make A Payment** button to process the payment.



Payment Options

After the customer has been selected the **Payment Options** screen is opened, from here you can set the number of payments that will be processed against the customer account. You can also apply additional **Fees**, add **Discounts**, add charges for **Services**, or attach additional **Deposits** to the account.

To add additional Fees, Discounts, Services or Deposits to this payment, click on the appropriate tab and select the item from the list. Once selected it will appear in the **Applied To Contract** box. Items in the Applied To Contract box will not be added to the payment until you click on the **Calculate** button

The **Current transaction** section will show any new items being added to this payment.

The **Past Due** section will show all charges that have already been posted to this account

The **Summary** section will show the total dollars being applied to all income categories.

Facility: Empower Storage Customer Name: Scott Mendez Unit: A8

Contracts Merchandise Payment Options Accept Payment

Rate: \$85.00 Number Of Payments: 1

Current Paid Through: 9/30/2012 Projected Paid Through Date: 12/1/2012

Billing Plan: Monthly Fixed

Applied To Contract

Mailed Invoice Fee	\$1.00	Delete
\$25 Referral Coupon	\$25.00	Delete

Current Transactions

\$25 Referral Coupon			(\$25.00)
Mailed Invoice Fee	<input type="checkbox"/> Waive Fee		\$1.00
Monthly Fixed: 11/1/2012			\$85.00
Mailed Invoice Fee	<input type="checkbox"/> Waive Fee		\$1.00
			Total: \$62.00

Past Due

10/1/2012	Monthly Fixed: 10/1/2012		\$85.00
10/5/2012	Late Fee	<input type="checkbox"/> Waive Fee	\$10.00
			Total: \$95.00

Summary - All Contracts

Rent Due:	\$170.00	Merchandise:	\$0.00
Discounts:	(\$25.00)	Insurance:	\$0.00
Fees Due:	\$12.00	Taxes Due:	\$0.00
Deposit Due:	\$0.00	Total Due:	\$157.00

Previous Next Finish

Use the up and down arrows to increase or decrease the number of payments

Click on the **Delete** button to remove an item from the payment

Click in the Wave Fee box to enter an offsetting credit against the fee that is being charged to the account

Click on the **Next** button or the **Accept Payment** tap to proceed to the payment screen

Multi-Unit Payment

Selecting multiple units / customers from the Contracts screen, or selecting a customer who has linked units will display all units as tabs across the top of the payment screen (see illustration below). By default the **Number Of Payments (All Contracts)** is set to "1" you can increase the number of payments across all the units, or you can set this value to "0" and manually set the number of payments on each unit individually, by moving the cursor down to the **Number Of Payments** selection box (below the unit tabs) and selecting the number of payments for the unit tab that is highlighted

Payment: International Foods Inc. - 3114

Facility: Empower Storage Customer Name: International Foods Inc. Unit: 3114

Contracts Merchandise Payment Options Accept Payment

Number Of Payments (All Contracts): 1

Rate: \$49.00 Number Of Payments: 1

0001 International Foods Inc. 0029 International Foods Inc. 3114 International Foods Inc.

Calculate

Selected unit tabs. Clicking on a tab will display the payment details for that unit

Select the number of payments for the entire range of units.

Select the number of payments for individual units

Processing a Payment

This is the last screen in the payment process, and is where you select the type of payment being received (Cash, Check or Credit Card) individually or any combination of the three payment types.

Cash Payment

To enter a cash payment click on the check box next to **Cash**, the **Cash Received** field will automatically be filled in with the payment balance that was calculated in the Payment Options screen. If the payment that is being applied is different than the amount calculated, enter the cash received into the **Cash Received** field. If the payment received is lower than the balance due, the **Balance** field will show the remaining balance on the unit.

Enter the amount of payment here, if it is different than what has been calculated

If the payment is going to be split between cash and another payment type, enter the amount of the cash payment here

If cash received exceeds what is due, select the over payment amount as Prepaid rent or Change to be returned to customer

Select **Cash** for cash payments

If the payment received is more than the balance on the unit, an **Over Payment** box will appear. You have two choices as to how to account for this over payment; **Apply As Prepayment** will post the over payment credit as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit. **Give Change Back**, will calculate the difference between the amount due and the amount being received, and display the result as **Change**.

The **Payment Summary** will list how the payment was received and display the Balance on the unit.

Check Payment

To enter a check payment click on the check box next to **Check**, the **Check Amount** field will automatically be filled in with the payment balance that was calculated in the Payment Options screen. If the payment that is being applied is different than the amount calculated, enter the amount of the check into the **Check Amount** field. If the payment received is lower than the balance due, the **Balance** field will show the remaining balance on the unit.

If the payment received is more than the balance on the unit the over payment will post as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.

The check number, account number and bank routing numbers can be automatically entered into the check payment screen by scanning the check.

If a check scanner is installed, an icon of the scanner will be displayed. Click on the icon to scan the check.

Process ACH Selecting this option will automatically deposit the check into your checking account.

When the check is ran through the check scanner an image of the check is added to the customer account

The balance due will be automatically entered, if the check payment is for a different amount, enter the check amount here.

If the payment is being split between check and another payment type (cash or credit card), enter the amount of the check payment here.

If the check is to be automatically deposited select the **Account Type & Account Class** prior to clicking on the **Process ACH** button.

The **Payment Summary** will list how the payment was received and display the balance on the unit.

Credit Card Payment

To enter a credit card payment click on the check box next to **Credit Card**, the **Amount** field will automatically be filled in with the payment balance that was calculated in the Payment Options screen. If the payment that is being applied is different than the amount calculated, enter the amount of the check into the **Amount** field. If the payment received is lower than the balance due, the **Balance** field will show the remaining balance on the unit.

If the payment received is more than the balance on the unit the over payment will post as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.

Select one of the three previous credit cards used in the past on this account.

To manually enter a credit card, select **Phone** and enter the credit card number into the **Credit Card** field

If this card will be used to automatically pay rent each billing cycle click on **Automatically Charge Future Rent**

To scan a credit card, select the scanner that has been installed on your system.

Select Credit Card as the payment type

Once the credit card has been scanned or the credit card number has been manually entered, click on **Charge Card** to process the payment

Payment Summary	
Cash:	\$0.00
Check:	\$0.00
Credit:	\$80.75
Debit:	\$0.00
Total Payment:	\$80.75
Balance:	\$0.00

Recording a Credit Card payment from a standalone terminal

If you are using a standalone credit card terminal to charge a card and would like to record the payment in Storage Commander, or if you accept credit card payment over the phone, you can manually enter the credit card information into the credit card payment screen. Using this method allows Storage Commander to record the payment as a credit card transaction in the customer payment history and also maintain consistency throughout the financial reports.

To manually enter a credit card payment, select **Phone** and enter the credit card number into the **Card Number** field, enter the **Name On Card**, **Billing Address**, **Expiration Date**, **CVV** number, **Billing Zip** code, click on the **Charge Card** button to charge the card

Posting a Credit Card Payment Without Charging The Card

To record a credit card charge transaction without actually charging the card (you would use this method if you use a separate credit card terminal for charging credit cards) select **Phone** and manually enter the first and last four digits of the credit card number into the **Card Number** field, enter the **Name On Card**, **Billing Address**, **Expiration Date**, **CVV** number, **Billing Zip** code and the **Approval Code**. Click on the **Finish** button to complete the payment transaction.

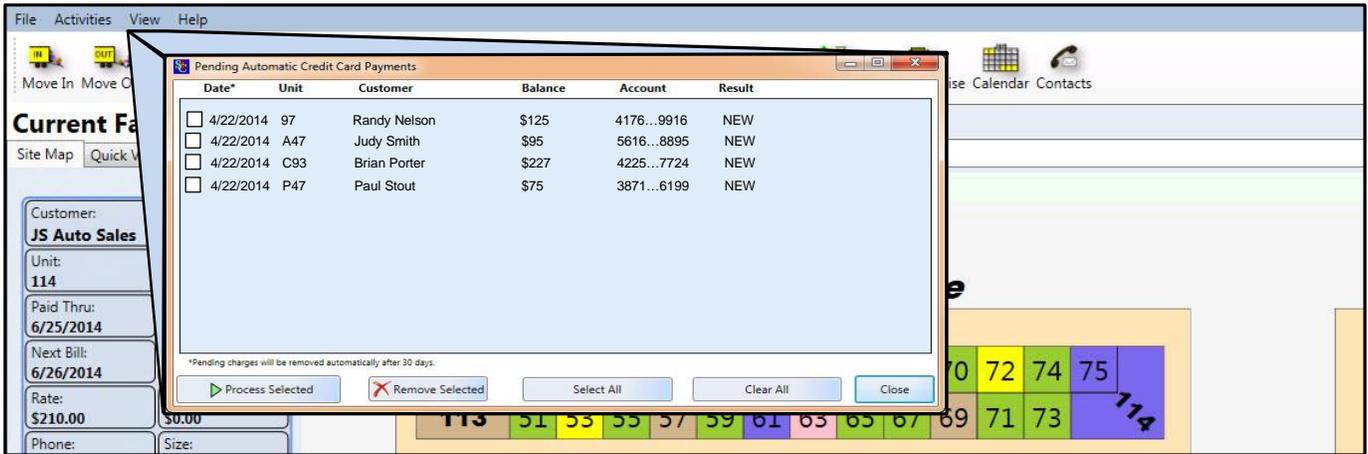
Storage Commander V5 will retain the last three successful credit card transaction made on a customer account, and allow you to use the same credit card form any of the past three transactions against a new payment. To use this feature, go to the **Select Prior Card** field and click on the down arrow to display the last three credit cards used on this account (Note that you can only see the first and last 4 numbers on each card), select the card that will be used and continue with the payment.

Removing a Credit Card from Card On File List

In the **Select Prior Card** field click on the **Remove** button to the right of the card number to be removed.

Processing Auto Credit Cards

As end of day is ran customers who have elected to have their rent payment automatically charged to a credit card are compiled and put into the **Pending Auto Credit Card Payments** screen. This screen is located under the **View Pull Down** menu under **Pending Auto Credit Card Payments**. The cards are not actually charged until you have reviewed this list, selected the cards to be charged and clicked on the **Process Selected** button.



Debit Card Payment

To enter a debit card payment click on the check box next to **Debit Card**, the **Amount** field will automatically be filled in with the payment balance that was calculated in the Payment Options screen. If the payment that is being applied is different than the amount calculated, enter the amount of the payment into the **Amount** field. If the payment received is less than the balance due, enter the actual amount of the payment into the Amount field. Once the payment amount is entered the **Balance** field will show the remaining balance on the unit.

If the payment received is more than the balance on the unit the over payment will post as a pre-paid credit on the customer account, which will be applied the next time rent is charged to the unit.

When the Scan Card button is clicked, an itemized list of all items that constitute the Amount Due will appear on the Customer Access Terminal. When the customer accepts the total they will be prompted to swipe their card and enter their PIN number.

Payment Summary	
Cash:	\$0.00
Check:	\$0.00
Credit:	\$0.00
Debit:	\$181.00
Total Payment:	\$181.00
Balance:	\$0.00

Click on the Finish button to complete the payment



Partial Payments

To process a partial payment (a payment being made for less than the balance on the account), from the **Accept Payment** window enter the amount to be applied to the account into the **Amount** field

Payment Summary	
Cash:	\$50.00
Check:	\$0.00
Credit:	\$0.00
Debit:	\$0.00
Total Payment:	\$50.00
Balance:	\$115.00

When the amount of the partial payment has been entered, the payment summary section will show the total payment being made and the resulting new balance due on the account.

NOTE: Partial payments will be applied against the oldest balances on the account. This is typically rent but could be fees or insurance if these balances are older the rent balance.

Reversing a Payment

Payments can be reversed within the day the payment was entered, if a payment needs to be reversed after the close of business you will need to make an adjustment to the customer account to charge back the amount of the incorrect payment.

From the **Customer/Units** screen double click on the customer in the **Contacts** section. In the left margin locate and click on the **Ledger/History** button. Locate the payment to be reversed and right click on the payment transaction item, click on the Reverse Transaction item in the action box and select OK at the prompt to proceed. A **Reversed Payment** entry will be posted to the customer ledger, and the amount of the payment will be charged back to the account.

Click on the **Ledger/History** tab, locate and **RIGHT** click on the payment item and select **Reverse Transaction**

The reversed payment will be included the **Reversed Transactions**, **Transaction Detail** and **Transactions Summary** reports. All references to the payment will be removed from all financial reports and added to the Reversed Payments report.

Move-In



Move-In Methods

Storage Commander allows you to use different methods to initiate the move-in process. You can choose from any of the methods that you feel most comfortable with as they will all deliver the same result.

We will start by showing you all of the move-in methods

Tool Bar

Click on the **Move In** Button in the Tool Bar

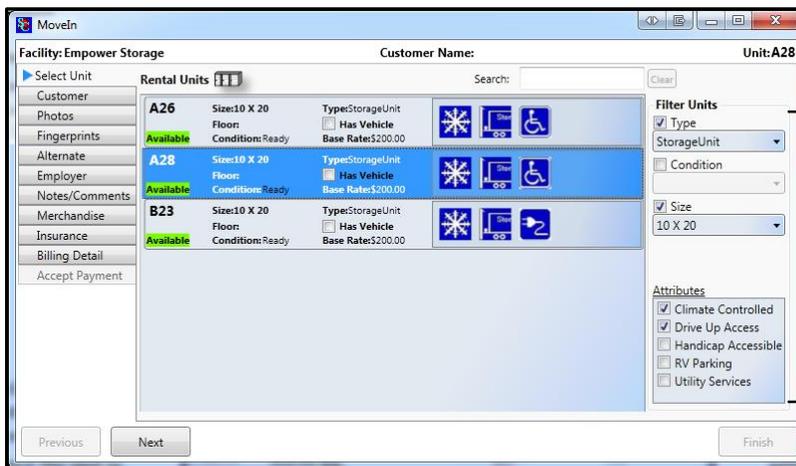
Unit Selection: Select the unit you would like to assign the customer to. If you are looking for a specific unit size, type, or configuration, you can sort the available unit list by any combination of the following:

TYPEStorage Unit, RV Parking, Mail Box, Wine Locker, or any other type that was created for your facility.

SIZEBy unit size.

Attributes.....Created and assigned to units through the Configuration Manager program.
(In this example we have created several attributes for the writing of this manual)

- CLIMATE CONTROLLED
- DRIVE UP ACCESS
- HANDICAP ACCESSIBLE
- RV PARKING
- UTILITY SERVICES



You can limit the available units that are displayed by using the unit and attributes filters

Selecting any combination of unit attributes, size, condition, type or status will cause the available unit list to automatically show the units that meet the selected criteria.

Once the unit is selected it will become highlighted. Click **Next** to Proceed

Move-In using Activities pull down menu

Located at the top of the screen is the Activities pull down menu item, clicking on this item opens a pull down menu which lists management functions available to you depending on your security level. One of these items is Move-In. Selecting Move-In will open the Move-In window where you will start the move-in process.



Move-In using Customers / Units Screen

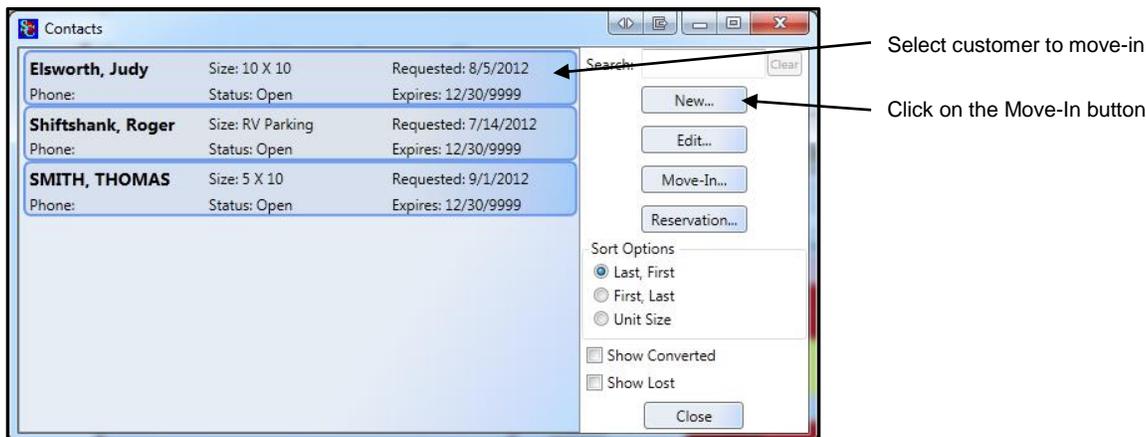
To start a move-in from the Customers / Units screen, click on the Customer / Units tab and select an available unit from the units list.



Move-In using Contacts Screen



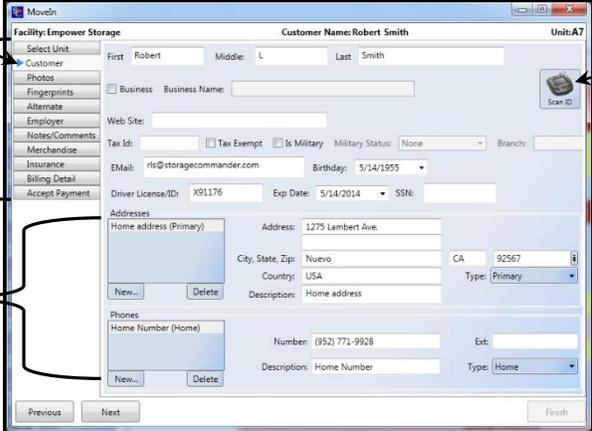
Customers who have been entered into the system as contacts can easily be moved-in. Click on the Contacts button in the tool bar to open the contacts window. Select the customer and click on the **Move-In** button.



Starting the Move-In Process

Customer Tab

After the storage unit has been selected the next step is to enter the Customer Information. This consists of the customers name, address, telephone number and other information that can be used to contact the customer. Fill in the customer information fields as required using the Tab key or mouse to move from field to field.



The screenshot shows the 'Move-In' window for 'Empower Storage' with 'Customer Name: Robert Smith' and 'Unit: A7'. The left sidebar contains tabs: Select Unit, Customer, Photos, Fingerprints, Alternate, Employer, Notes/Comments, Merchandise, Insurance, Billing Detail, and Accept Payment. The main form fields include: First (Robert), Middle (L), Last (Smith), Business Name, Web Site, Tax Id, Is Military, Military Status, Branch, EMail (rl@storagecommander.com), Birthday (5/14/1955), Driver License/ID (X91176), Exp Date (5/14/2014), SSN, and a 'Scan ID' button. Below these are sections for 'Addresses' (Home address: 1275 Lambert Ave., City: Nuevo, State: CA, Zip: 92567, Country: USA, Type: Primary) and 'Phones' (Home Number: (952) 771-9928, Type: Home). 'New...' and 'Delete' buttons are present for both sections. 'Previous', 'Next', and 'Finish' buttons are at the bottom.

Customer Tab

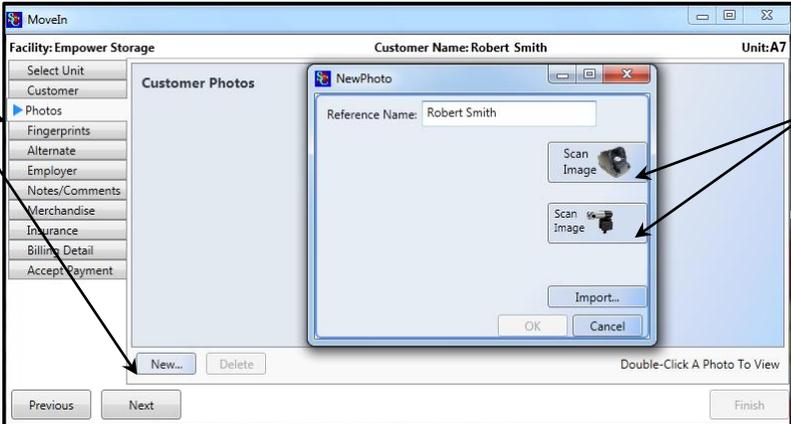
You can move to any of the setup tabs at any time.

Click on the **New** buttons to add addresses and phone numbers to the account

If the driver license ID conforms to the AAMVA standard, and you have installed an id scanner, a button showing the installed scanner will appear. Click on this button to scan the id and have the customers address information automatically entered into the move-in screen

Photo ID

Adding a customers photo id to the customers account allows for easy visual identification through the Site Map. To add a photo id during a move-in, click on the Photo tab to display the photo id screen and click on the New button. Enter the name of customer and click on the Scan Image button



The screenshot shows the 'Move-In' window with the 'Photos' tab selected. A 'NewPhoto' dialog box is open, showing 'Reference Name: Robert Smith' and two 'Scan Image' buttons with scanner icons. There is also an 'Import...' button and 'OK'/'Cancel' buttons. The background shows the 'Customer Photos' section with 'New...' and 'Delete' buttons. 'Previous', 'Next', and 'Finish' buttons are at the bottom.

Click on the Photos tab and then on the New Button

Any devices supporting photo id capture will be displayed in the **New Photo** screen. Select the device to proceed to the photo capture screen.



Using the Storage Commander Web Cam

Click on this button to activate the photo editing software of the web cam manufacturer. Click on the Capture button to capture the image of the photo id, followed by the Transfer button to attach the photo id to the customers account in Storage Commander



The screenshot shows the 'Creative Twain Center' software interface. It features a 'Photo Capture' section with a 'CALIFORNIA DRIVER LICENSE' image and a 'Settings' button. A 'Captured Photos' section shows a 'Transfer' button. The software is identified as 'Creative VF0400'.

Click on the **Capture** button to capture the photo id image.

Click on the **Settings** button change the image settings used by the web cam manufacturer

Click on the **Transfer** button to copy the photo id into Storage Commander

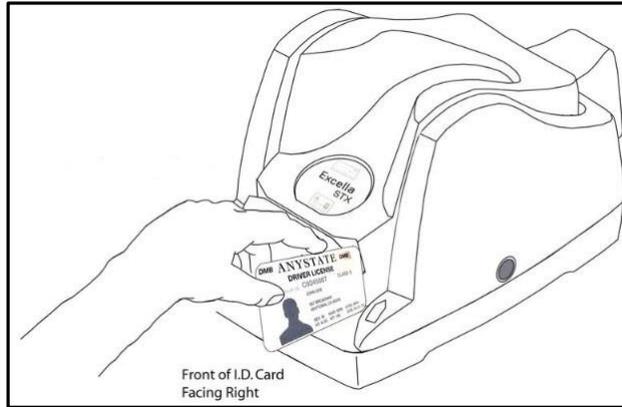
Creative VF0400



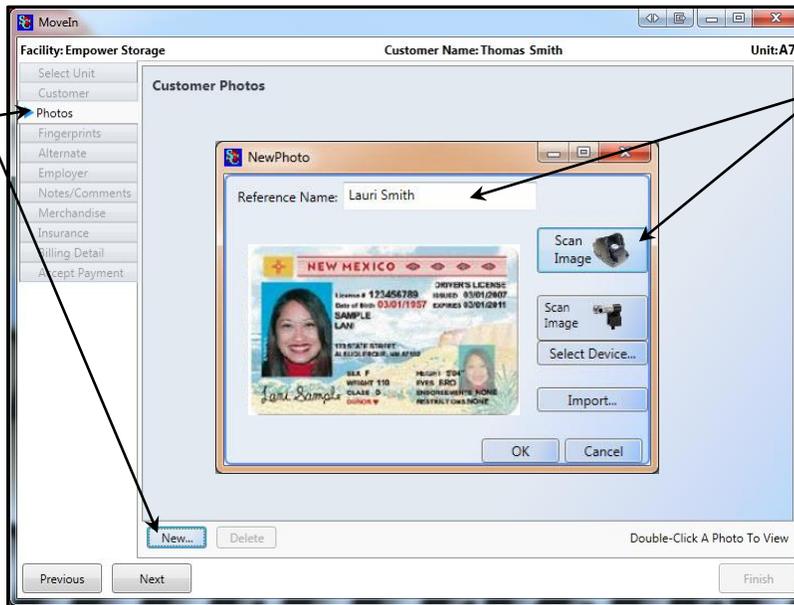
Using the Multipurpose Scanner

The multipurpose scanner offers a convenient method to scan driver licenses. This device not only takes the place of the Photo ID Kit but also scans and transfers the data from Checks, Credit Cards & Driver licenses (*driver licenses must conform to the national AAMVA standard*)

To capture an image of a driver license using the multipurpose scanner, click on the button showing a picture of the multipurpose scanner. Insert the customer id into the scanner as referenced below.

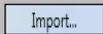


Click on the Photos tab and then on the New Button



Enter a Reference Name and click on the Scan Image button for the multipurpose scanner

The driver license id will be automatically moved into the multipurpose scanner and the picture will be appear in the New Photo window. Click on the OK button to complete the process.



Importing Pictures

The Import feature allows pictures taken from digital cameras to be added to a customer account. To add digital pictures, click on the **Import** button and navigate to the drive/folder where the picture resides, select the picture and click on the Open button. Enter a **Reference Name** and click on the **OK** button to add the new picture to the customer account.

Deleting Pictures

To delete a photo id from a customer account open the Customer Details screen for the account and select the **Photos** tab. Click on the photo to be deleted (you can have multiple photos assigned to an account) and click on the **Delete** button.

Adding Fingerprints

Storage Commander supports fingerprint identification of storage customers and facility managers. To register a storage customer's fingerprint during the move-in process, click on the **Fingerprint** tab and select **Add Fingerprint**. Have the customer press their finger (we recommend using the right index finger) onto the fingerprint pad four (4) consecutive times (this is necessary in order for the system to insure a positive read of the fingerprint pattern). When all four scans have been completed, click on the OK button to complete the process.

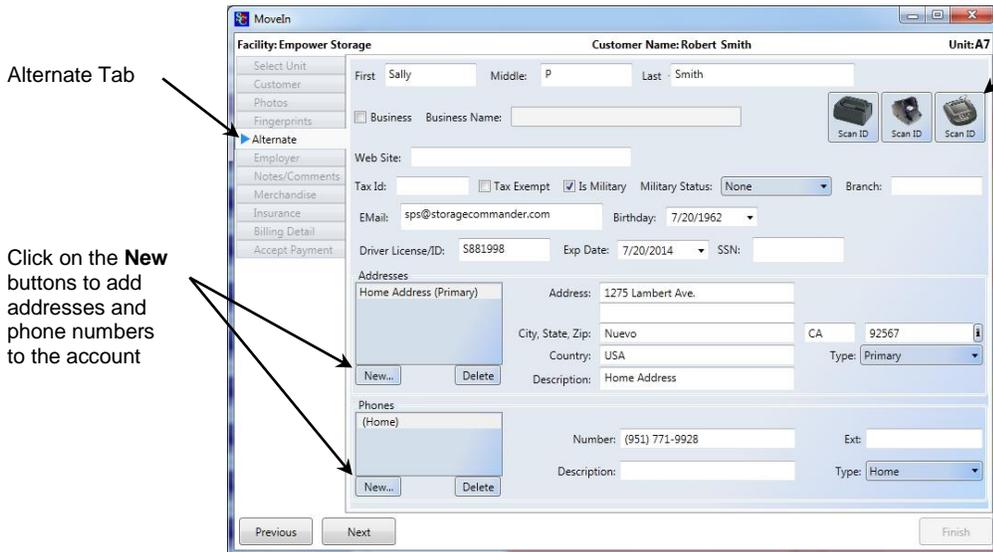


To verify a customer using their fingerprint, click on the **Customers/Units** tab and double click on the customer in the **Contacts** list. Select the **Fingerprints** tab, select the customer's fingerprint file under the **Fingerprints On File** box and click on **Verify Customer**. Have the customer press their finger into the fingerprint scanning pad to initiate the verification process.

Using a fingerprint to identify a customer or to log a manager into the system provides the upmost in facility security.

Adding Alternate Contacts

Fill in the Alternate Contact information fields as required using the Tab key or mouse to move from field to field. This information will aid you in locating the primary occupant in case of emergency or for collections purposes.

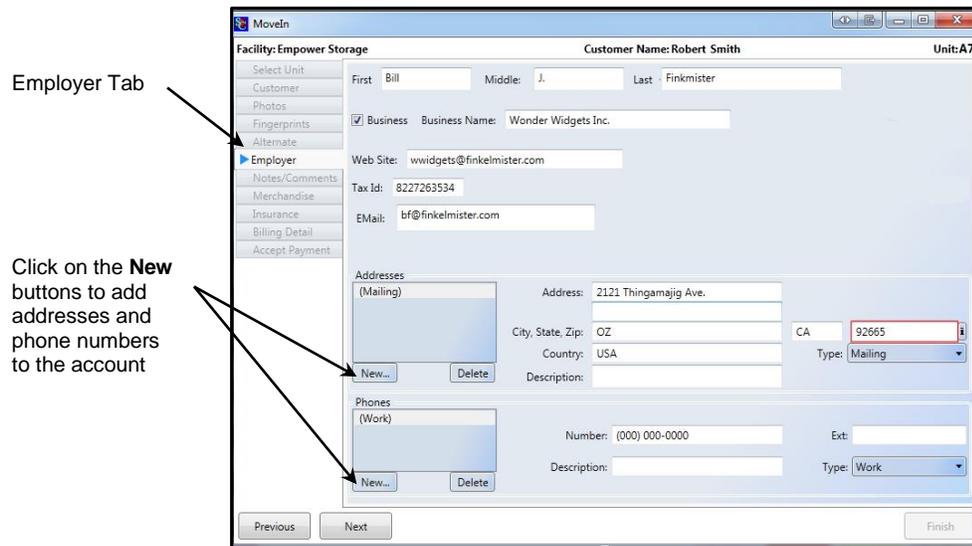


If the driver license ID conforms to the AAMVA standard, and you have installed an ID scanner, a button showing the installed scanner will appear. Click on this button to scan the ID and have the customer's address information automatically entered into the move-in screen.

Adding Employer Information

Fill in the Employer Information information fields as required using the Tab key or mouse to move from field to field.

This information will aid you in locating the primary occupant in case of emergency or for collections purposes.

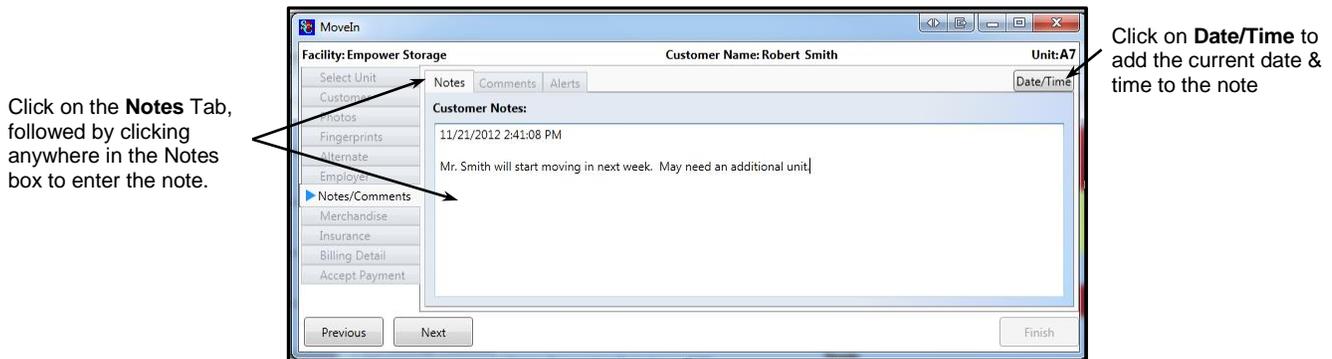


Adding Move-In Notes / Comments & Alerts

Adding Notes, Comments or Alerts during a move-in allows you to add general or even critical information to a customers account. Both Notes and Alerts can be edited or even removed from an account at any time, whereas Comments cannot be edited or removed once they have been added to an account.

Adding Notes

From the Move-In window select **Notes/Comments** and click on the **Notes** Tab. Clicking on the Date/Time button will insert the current date and time into the note field. Enter the note by typing in the note box.

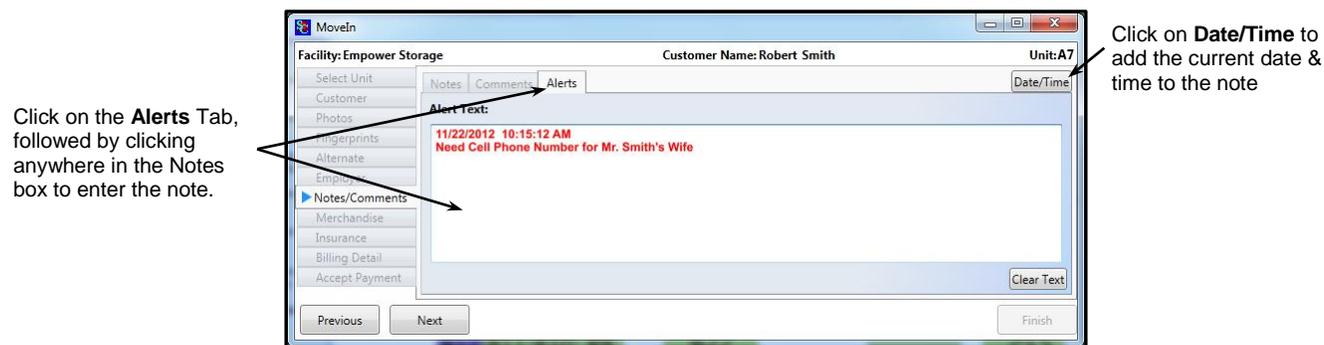


The note will be automatically saved when you leave the Notes screen.

Adding Alerts

Alert messages allow messages to be posted to a customer's account that will be automatically displayed whenever any type of account activity is detected

From the Move-In window select **Notes/Comments** and click on the **Alerts** Tab. Clicking on the Date/Time button will insert the current date and time into the note field. Enter the note by typing in the note box.

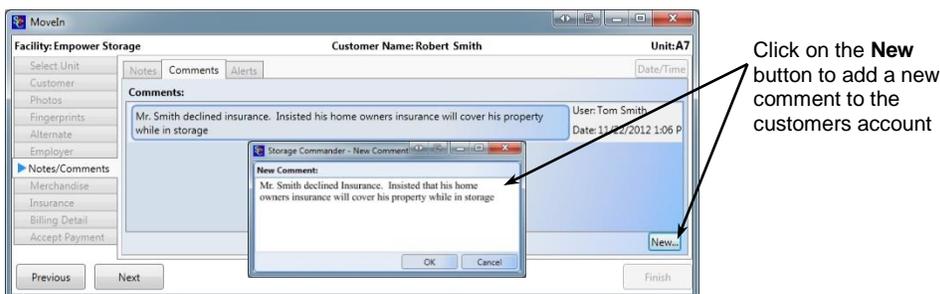


The alert note will be automatically saved when you leave the Alerts screen.

Adding Comments

Customer comments differ from customer notes in that once they are entered, a date and time stamp is added to the note along with the id of the logged in manager. When the note is saved, it cannot be altered.

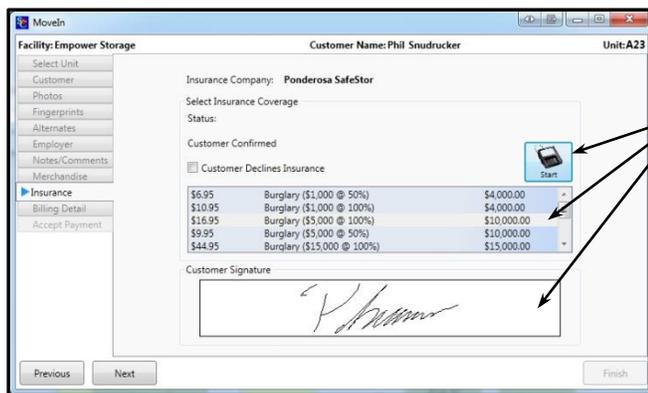
From the Move-In window select **Notes/Comments** and click on the **Comments** tab. Any comments that have been previously added to the account will be displayed. To add a new comment click on the **New** button and enter the note into the **New Comment** box, click on the **OK** button to save the new comment. Once the comment is saved it will be added to the comments box with the User Name (manager) and the date and time of when the comment was recorded.



Note: It is strongly recommended that you review the message prior to saving it, as the message cannot be edited or removed from the customer account once it has been saved

Adding Insurance to a Customer Account

Clicking on the Insurance tab opens the insurance policy selection screen. If you have purchased the Customer Access Terminal, click on the C.A.T. icon to allow the customer to select the insurance policy and digitally sign the insurance contract.



Click on the Customer Access Terminal icon to allow customer to select insurance policy and to digitally sign insurance contract



Customer Access Terminal showing insurance policy selections

Note: *Displaying available insurance policies and digitally signing the insurance contract is only available when using SafeStor insurance.*

If you are not using the Customer Access Terminal or if you are using another insurance provider, click on the insurance policy requested by the customer, to assign the policy to the move-in.

Click on the **Next** button to proceed with the move-in

Advanced Vehicle Storage Information

The screenshot shows the 'MoveIn' software interface for 'Empower Software'. The customer name is 'Robert Conrad' and the unit is '152'. The interface is divided into several sections:

- Vehicle Information:** Includes fields for Make (Chevy), Model (Belair), Color (Blue), Year (1955), Body Style (TwoDoor), Estimated Value (\$42,000.00), Type Desc (Vintage Automobile), License (LMQ494), License State (Ca), Title Nbr, Reg Expiration (7/15/2015), VIN, Insur Company (Allstate), Insur Policy (88176289), Insur Exp (9/30/2015), Vehicle Type (Automobile), and Length.
- Boat Information:** Includes fields for Boat Name, Boat Length, Home Port, Doc Number, ID Number, Serial Number, Estimated Value (\$0.00), Year, Make/Model, and a Tenant Owned checkbox.
- Boat Motor Information:** Includes fields for Estimated Value (\$0.00), Horse Power, Id Number, Make, and Type (None).
- Trailer Information:** Includes fields for License Exp (9/30/2014), License, State, Estimated Value (\$0.00), Insur Exp (1/1/0001), Insur Company, Insur Policy, Owner Addr, and Serial Nbr.

Brackets on the right side of the screenshot label these sections as: 'Vehicle (automobile, motorcycle, RV) information section', 'Boat information section', 'Boat Motor information section', and 'Trailer information section'. Navigation buttons 'Previous', 'Next', and 'Finish' are visible at the bottom.

During the move in process selecting the Vehicle tab will open the Vehicle information screen. From this screen you will be able to enter critical information covering insurance status, vehicle identification numbers, DMV information in addition to other valuable data that can be used to insure you that the vehicles stored at your facility are adequately identified.

Entering Data into the Vehicle Information Screen

If the **Vehicle Info** tab is not visible this signifies that the space you have selected is not configured to accept vehicles. If you wish to change the unit configuration to allow vehicles, click on the **Select Unit** tab and scroll to the unit/space number you are moving the customer in to. Once you have located the space number click on the **Has Vehicle** check box.

Enter as much information pertaining to the vehicle as possible, keeping in mind the more information that is entered will provide more concise reports and improved vehicle tracking.

Available Vehicle Information Reports

Vehicle reports can be printed at any time and can also be included in report groups, allowing the reports to be automatically printed / emailed on specific time frames (daily, weekly, monthly annually).

The Vehicle Information reports are located in the **Reports** section of Storage Commander under:

Units

- Vehicle Expirations
- Vehicle Insurance Expirations
- Vehicles

Analysis

- Length of Stay

Move-In Billing Screen

The move-in billing screen is where we pull all the elements of the move-in together. From this screen you will assign a Billing Plan, Gate Access code and Lease Number (if you use lease numbers) to the new customer, as well as add Fees, Discounts, Services, and Deposits to the new account. Additionally you can record Contact information to the account for demographic reference.

Click inside the **Rate** field to change the rate on this unit (typically used to match rates with a competing storage facility)

Increase / Decrease the number of rental payments

Adjust the date of the move-in

Re-Calculates Move-In totals

Displays projected Paid Through date based on the number of payments selected

Remove the 1st month prorated rent (only available on fixed billing plans)

Select Billing Plan to be assigned to customer account

Select to assign gate code

Assign a Lease Number to customer account

Preview copy of lease agreement

Fees, Discounts, Services or Deposits that have been added to the account will be listed here. To remove an item from this list, click on the **Delete** button next to the item to be removed.

Add additional Fees, Discounts, Services or Deposits to the account

After clicking on the Calculate button, all items relating to this move-in will be listed under Current Transactions

The Summary section lists all individual transaction totals and shows the total due

If a Fee or Discount has been configured to allow it to be Waived, a Wave Item selection box will appear to the right of the item. Selecting this will create an offsetting credit to the account

Contact Type: How did the customer find your facility

Contact Category: Used to profile customer. Military, Local Resident, Senior....

Contact Source: What type of advertising directed the customer to your facility

Reason For Renting: What sold the customer on your facility

Confirm Move-In Information



Customer move in information, such as Tenant, Alternate, & Employer contact information, Insurance information, Itemization of move-in cost, and capturing of signature for move in and insurance agreements. All of these items are displayed on the Customer Access Terminal allowing the customer to verify the accuracy of the move in and contract data prior to completing the move in process,

Changing Move-In Date

Click on the down arrow in the Move-In date field to change the date of the move-in. By default the move-in date will be set to the current date. By changing the date the prorated rental charge will be re-calculated (fixed billing plans) and the new move-in date will be recorded to the customer account.

Changing the Rental Rate

The default rental rate referenced in the **Rate** field can be changed by clicking inside the rate field and entering the new rate. Once the rate is changed it will remain in effect until the customer moves out (at which time the rate will change back to the default rate) or until a rate change is applied to the customer (see Rate Change discussed later in this manual).

Changing the Number Of Payments

To process payments in addition to the rental payment for the current month, increment the number of advanced payments in the **Number Of Payments** field. After entering the number of advanced payments, click on the **Calculate** button to add the prepayments into the **Current Transactions** section.

Projected Paid Through Date

The date referenced in the **Projected Paid Through** field shows the month, date and year the account will be paid through based on the number entered into the **Number Of Payments** field.

Selecting the Billing Plan

Billing plans created and setup in the Configuration Manager program, and then assigned to a facility. What you see when you open the Billing Plan window is a list of available billing plans that have been assigned to your facility. Each billing plan can be radically different from other plans, so care should be taken when selecting a billing plan for the current customer. For more information on Billing Plans, refer to the Configuration Manual.

Don't Prorate

Selecting **Don't Prorate** will remove the current months prorated rent from the move-in (Storage Commander will not charge the prorated rent). This feature will only work on billing plans that are configured to Prorate rent on move-in

Lease Number

Enter the lease number that has been assigned to this move-in. If the merge code (Contract Number) has been included the move in contract the number entered here will be inserted into the move in contract.

Access Control

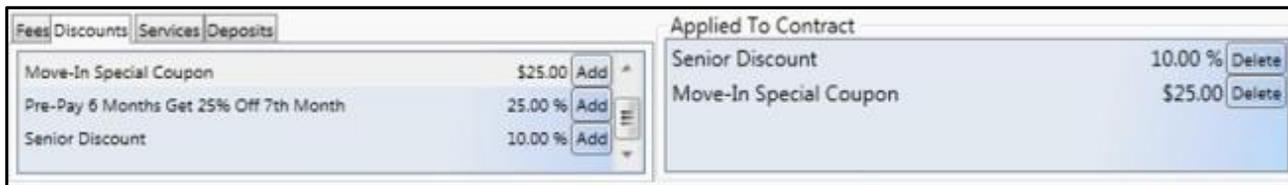


Click on the **Access Control** button to open the **Gate Access Details** window. Enter the customers gate access number that has been assigned to the customer into the **Access Code** field. If your gate security system supports multiple entry gates and gate access times, you can enter the codes for these features into the **Key Pad** and **Timezone** fields. When the move-in is completed all access control settings will be sent to the gate system. The **Deny Access** check box will disable the gate code at the keypad restricting the customers access into the facility. Although this same function is automatically accomplished through the late step process, you can override the late step and manually deny the customer gate access by selecting this function.

To manually deny a customers gate access go to the **Contract Details** screen for the customer, select the **Contract** tab and click on the **Access Control** button to open the **Gate Access Details** window, click on the Deny Access check box to restrict the customers gate access. A check mark will appear in the box, clicking on the Deny Access box again will remove the check mark and grant the customers access into the facility.

Adding Fees, Discounts, Services & Deposits

Click on the **Tab** corresponding to **Fees, Discounts, Services** and **Discounts** to open a list of associated items for the selected tab. Select an item by clicking on the **Add** button to the right of the item. Once selected the item will appear in the **Applied To Contract** window. Clicking on the **Calculate** button will add the items in the Applied To Contract window to the **Current Transactions** section, where they will be included in the move-in and attached to the customer account.

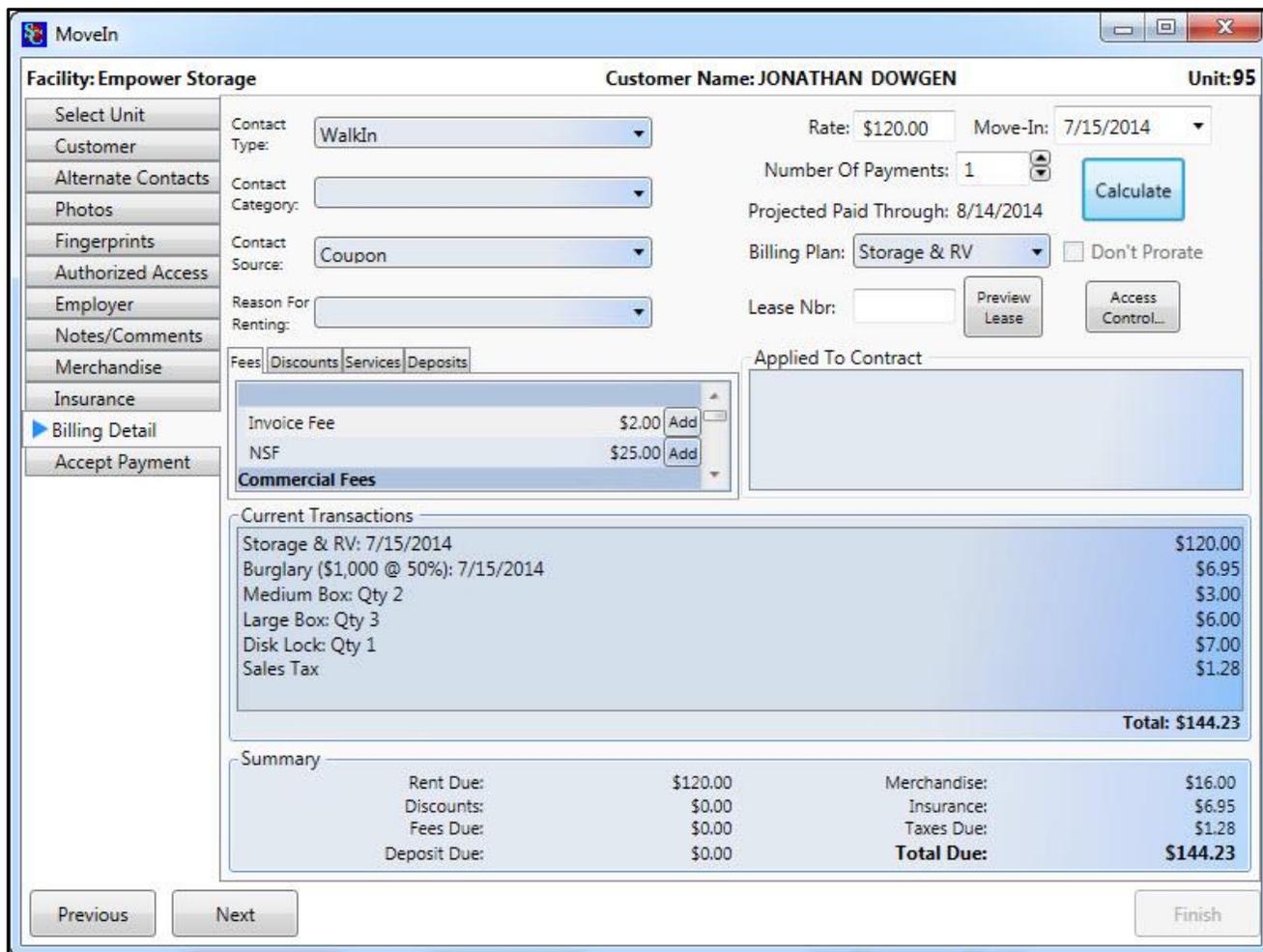


Current Transactions

The **Current Transactions** section lists all of the transaction items that have been applied to this customer's account during the move-in process. The amount due for each item, or if fees have been waved or credits/discounts have been applied, they will also be listed here (See illustration below).

Summary

The Summary section will break down and total each item contained in the current transaction section by account type, and show the total due for the move-in (See illustration below).



Move-In Payment Screen

This is the final screen used in the Move-In process and is where the type of payment is selected as well as how much money is being received.

Select the payment type by clicking on the appropriate payment type check box.

The screenshot shows the 'Move-In' payment screen for 'Empower Storage' with customer 'Susan Flingflanger' at 'Unit: B8'. The 'Accept Payment' section is active, showing 'Cash Received: \$80.00' and an 'Over Payment' box with options 'Apply As Prepaid' and 'Give Change Back' (selected), resulting in a 'Change: (\$6.83)'. A 'Payment Summary' table is displayed at the bottom.

Payment Summary	
Cash:	\$73.17
Check:	\$0.00
Credit:	\$0.00
Debit:	\$0.00
Total Payment:	\$73.17
Balance:	\$0.00

Navigation buttons: Previous, Next, Finish.

The payment amount that was calculated in the billing screen will be automatically entered into the payment screen. If the payment is different than the calculated amount due, enter the **ACTUAL** payment being received into the **Cash Received** field (for cash payments), **Check Amount** (for check payments), or **Amount** field (for credit or debit card payments).

If the payment amount is higher than the amount due on cash payments, an **Over Payment** box will appear allowing you to select how you would like to handle the overpayment; the options are:

Apply As Prepaid; Where the money in excess of the amount due, will be applied as a credit balance on the account.
Give Change Back; where the money in excess of the amount due, can be given back to the customer.

Move Out

There are 5 different ways to initiate the move-out process. Although the move-out may be initiated from different



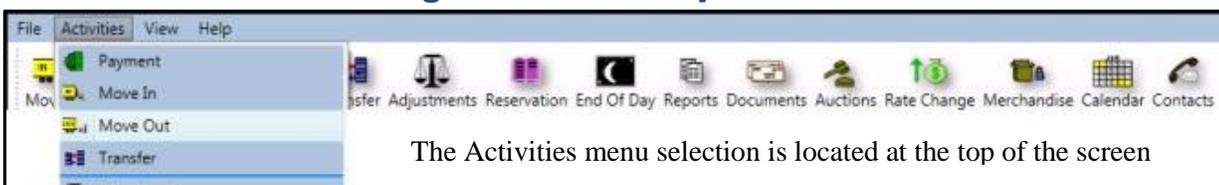
screens the overall process is the same. We will start this section by identifying all 5 move-out techniques. Once you know how to initiate a move-out using any of the 5 methods, we will walk you through the actual move-out procedure.



Initiate a Move-Out using the Button Bar

Click on the Move-Out button in the button bar located at the top of the screen, under the pull down menu items. This will open the Move-Out Contracts search screen containing all active customers. We will discuss this screen in detail later in this section.

Initiate a Move-Out using the Activities pull down menu



The Activities menu selection is located at the top of the screen

Move-Out Active Contracts Search Screen

The Active Contracts Search Screen allows you to quickly locate a customer for move-out. Through this screen you can perform a search based on Unit Number, Customer Name, or Customer Phone Number. To start a search, select one or all of the search parameters by placing a check mark in the appropriate check box. Once you have selected the search parameter enter the name, unit number or phone number into the **Search For** field. As you enter data into the search field Storage Commander will immediately list any match it finds in the database as you enter each character.

Enter the search criteria into the Search For field

Select search parameters

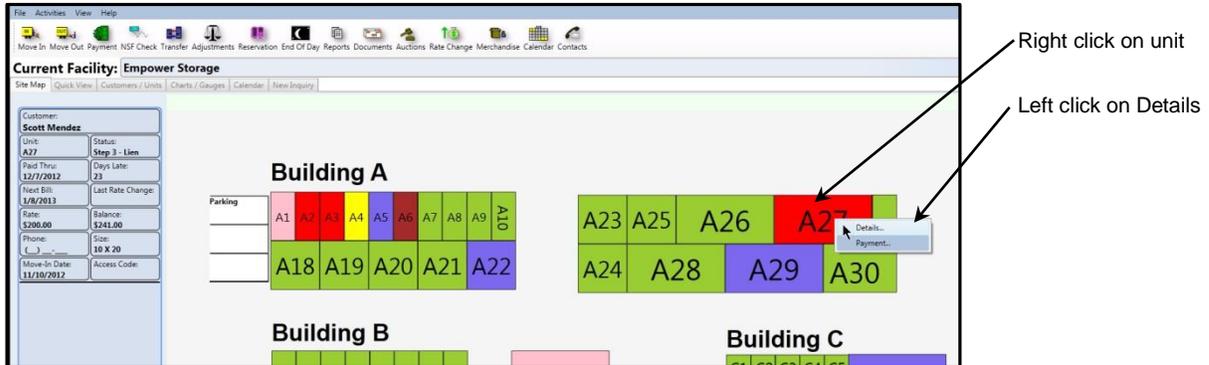
A list of all customers matching the search criteria will be displayed in the Contract (customer) list box

Click on the Next button to proceed with the move-out

Name	Unit	Phone	Status	Move-In
Scott Goodmen	A1	(619) 882-6652	QualityForAuct	11/5/2012
Jim Nelson	A2	(616) 777-1112	Overlocked	11/10/2012
Frank Schelling	A3	(619) 882-7765	Overlocked	11/20/2012
Bill Simple	A4	(956) 333-7777	DenyGateAcce	11/25/2012
Harry Sneedly	A5	(707) 881-7762	Current	11/27/2012
Sandy Snolkermister	A22	(951) 772-6625	Current	12/30/2012
Scott Mendez	A27	(415) 882-9928	Overlocked	11/10/2012
Big Stuff	A29	(951) 672-6257	Current	12/29/2012
Tom Smith	B12	(714) 887-1231	Current	11/27/2012
Nancy Smith	B20	(951) 881-7711	DenyGateAcce	11/25/2012
Mary Lou Hornaday	B21	(951) 672-6257	QualityForAuct	11/5/2012
Roger Shiftshank	C11	(951) 672-6257	Current	11/29/2012
Roger Ramjet	C15	(851) 872-6534	Current	12/29/2012
Nancy Johnson	C20	(951) 672-6257	QualityForAuct	11/5/2012
Roger Shiftshank	RV11	(951) 672-6257	Overlocked	11/20/2012
Scott Snyder	RV20	(951) 881-7726	Current	11/27/2012

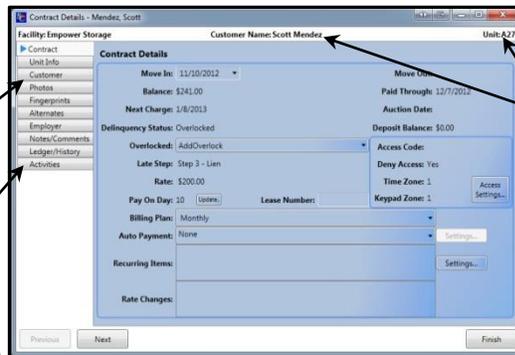
Initiate a Move-Out Using The Site Map

To use the site map to initiate a move-out, position the mouse over the customers unit, using the **RIGHT** mouse button click on the unit and select **Details** using the **LEFT** mouse button. This will open the **Contract Details** screen for the customer you selected for move-out. Verify that you have selected the correct customer. Click on the **Activities** tab located on the left side of the screen. In the **Activities For This Account** window select **Vacate This Unit**. The Move-Out billing screen will now be opened; from here you can apply additional Fees, Discounts, or services to the move-out. We will discuss this screen in detail later in the section.



Click on the Customer Tab to see the customer name and address information

Click on Activities / Vacate This Unit to open the Move-Out billing screen



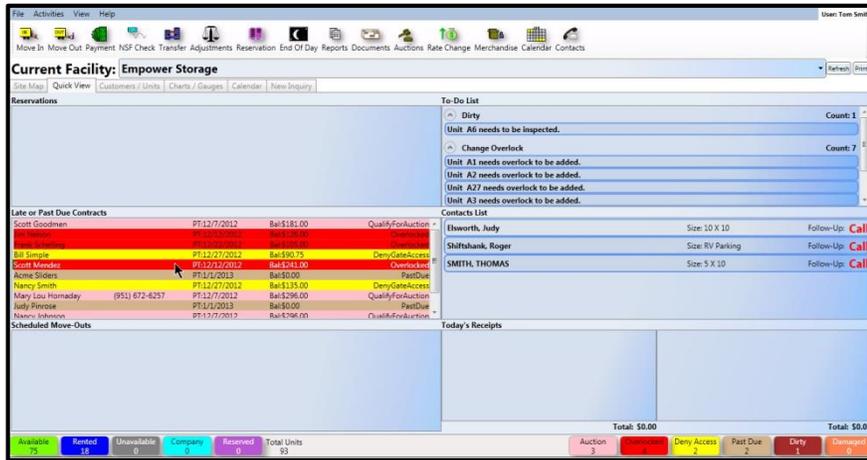
Verify Customer Name & unit number
Left click on Details



Click on the **Vacate This Unit** button to open the Move-Out billing screen

Initiate a Move-Out Through The Quick View & Customer/Units Windows

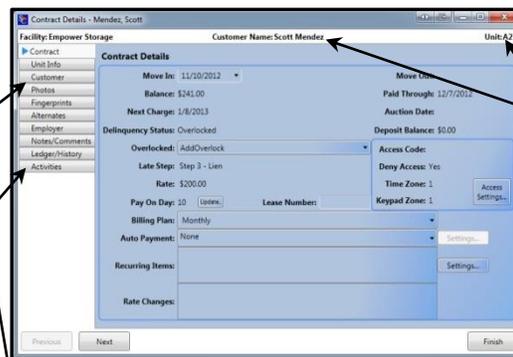
Double clicking on a customer name in Quick View or Customer/Units windows will open the Contract Details window. This will open the **Contract Details** screen.



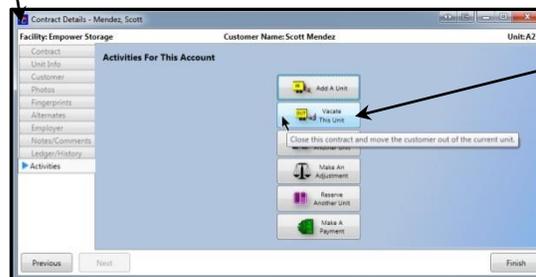
Verify that you have selected the correct customer. Click on the **Activities** tab located on the left side of the screen. In the **Activities For This Account** window select **Vacate This Unit**. The Move-Out billing screen will now be opened; from here you can apply additional Fees, Discounts, or services to the move-out. We will discuss this screen in detail later in the section..

Click on the Customer Tab to see the customer name and address information

Click on Activities / Vacate This Unit to open the Move-Out billing screen



Verify Customer Name & unit number
Left click on Details



Click on the **Vacate This Unit** button to open the Move-Out billing screen

Move-Out Billing

The Move-Out billing screen is the last major screen in the move-out process. From this screen you can add any last minute fees or discounts, change the calendar day of the move-out (for first of the month or other “fixed” billing plans, this will cause the prorated rent to be re-calculated), and select a Reason For Leaving, which will be used in the Vacate Report.

The screenshot shows the 'Move-Out' screen for 'Empower Storage' with customer 'Scott Mendez' and unit 'A27'. The move-out date is set to 1/7/2013. The reason for leaving is 'Moving Out Of Area'. The current balance is \$241.00. The screen displays a list of fees: Admin Fee (\$10.00), Auction Fee (\$50.00), and Certified Letter Fee (\$5.00). It also shows 'Current Transactions' for the month of 12/13/2012 totaling (\$35.50) and 'Past Due' transactions for 12/13/2012 through 1/2/2013 totaling \$200.00. A summary table at the bottom shows a total due of \$205.50.

Item	Amount
Admin Fee	\$10.00
Auction Fee	\$50.00
Certified Letter Fee	\$5.00
Total	\$241.00

Month	Description	Amount
12/13/2012	Monthly: 12/13-12/14	\$200.00
12/18/2012	Late Fee	\$10.00
12/23/2012	Pre-Lien Fee	\$10.00
1/2/2013	Certified Letter Fee	\$5.00
1/2/2013	Lien Fee	\$16.00
Total		\$241.00

Category	Amount
Rent Due:	\$164.50
Discounts:	\$0.00
Fees Due:	\$41.00
Deposit Due:	\$0.00
Merchandise:	\$0.00
Insurance:	\$0.00
Taxes Due:	\$0.00
Total Due:	\$205.50

- Click in the Move-Out Date field to change the date of the move-out
- Click on the down arrow in the Reason For Leaving box to select from a list of pre-defined vacate decisions
- Add additional Fees, Discounts, Services or Deposits to the account
- After clicking on the Calculate button, all items relating to this move-in will be listed under Current Transactions
- The Current Transactions section will show the amount of rent due or rent credit for the move-out as well as any additional fees or discounts that were applied
- The Past Due section shows all charges that were assessed and not paid
- The Summary section lists all individual transaction totals and shows the total due

Move-Out Accept Payment Screen

Select the payment type by clicking on the appropriate payment type check box.

The payment amount that was calculated in the billing screen will be automatically entered into the payment screen. If the payment is different than the calculated amount due, enter the **ACTUAL** payment being received into the **Cash Received** field (for cash payments), **Check Amount** (for check payments), or **Amount** field (for credit or debit card payments).

If the payment amount is higher than the amount due on cash payments, an **Over Payment** box will appear allowing you to select how you would like to handle the overpayment; the options are:

- Apply As Prepaid;** Where the money in excess of the amount due, will be applied as a credit balance on the account.
- Give Change Back;** Where the money in excess of the amount due, can be given back to the customer.

The screenshot shows the 'Move-Out Accept Payment' screen for 'Empower Storage' with customer 'Scott Mendez' and unit 'A27'. The payment type 'Credit Card' is selected. The card number is 4327xxxxxxx1726. The name on the card is JULIA L SMITH. The amount to be paid is \$205.50. A payment summary table at the bottom shows a total amount due of \$205.50 and a total payment of \$205.50, resulting in a balance of \$0.00.

Payment Type	Amount
Cash	\$0.00
Check	\$0.00
Credit	\$205.50
Debit	\$0.00
Total Payment:	\$205.50
Balance	\$0.00

Reservation



Placing a unit on hold (Reserved) causes Storage Commander to change the units color on the site map from Green (Vacant) to Purple (Reserved). You can take a reservation deposit at the time the unit is reserved which Storage Commander will credit back when the customer moves into the unit. Reserved units are tracked in the Unit Occupancy report but are not classified as rented units. A unit can be removed from a reserved status and all deposits returned to the customer, applied to other units or retained by the facility.

The reservation process is much the same as the move-in process, as the procedures and screens for entering the customer information are almost identical. The only difference between two processes is that setting up a reservation requires you to enter a **“Planned Move-In Date”** rather than a **“Move-In Date”**.

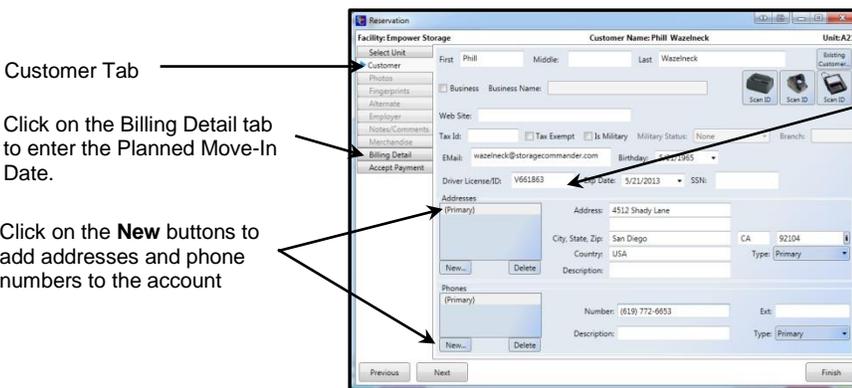
Other differences are that you cannot assign recurring Fees, Discounts, or Services to a reservation.

If you require a reservation deposit you must assign a **Billing Plan** to the reservation that includes a reservation deposit (billing plans are created in the Configuration Manager).

To reserve a unit click on the Reservations button in the tool bar, select the unit to be reserved from the list of available units, select the **Customer** tab to open the customer information screen. If no additional information is required, you can skip to the Billing Detail tab to enter the Planned Move-In Date.

Starting the Reservation Process

After the unit / RV space has been selected the next step is to enter the Customer Information. This consists of the customers name, address, telephone number and other information that can be used to contact the customer. Fill in the customer information fields as required using the Tab key or mouse to move from field to field.



Customer Tab

Click on the Billing Detail tab to enter the Planned Move-In Date.

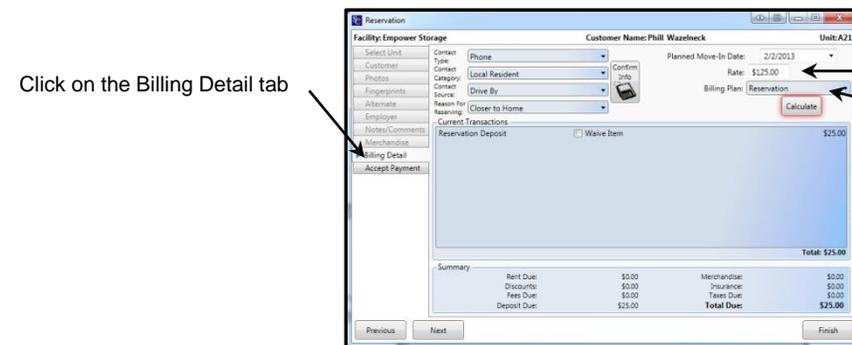
Click on the **New** buttons to add addresses and phone numbers to the account

If the driver license ID conforms to the AAMVA standard, and you have installed an id scanner, a button showing the installed scanner will appear. Click on this button to scan the id and have the customers address information automatically entered into the move-in screen

Entering a Planned Move-In Date & Reservation Deposit

From the Billing Detail screen enter the intended move-in date into the **Planned Move-In Date** field.

If a reservation deposit is required you must select a **Billing Plan** that includes a reservation deposit.



Click on the Billing Detail tab

Enter the Planned Move-In Date
Select a Billing Plane that includes a reservation deposit

Transfer

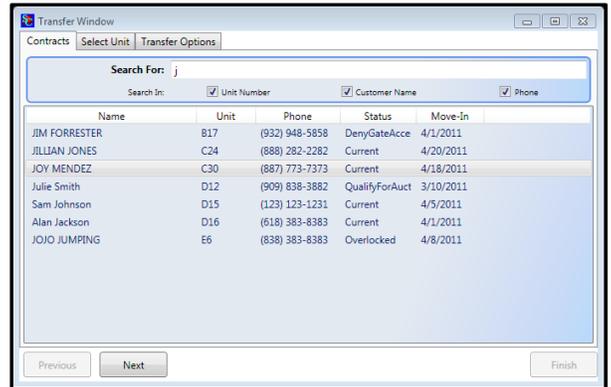


Customers can be transferred from their current unit to another unit through the Site Map by Right clicking on their unit and selecting Details | Activities | Transfer. You can also initiate a transfer from the Activities pull down menu, or through the Quick View and Customer / Units screens.

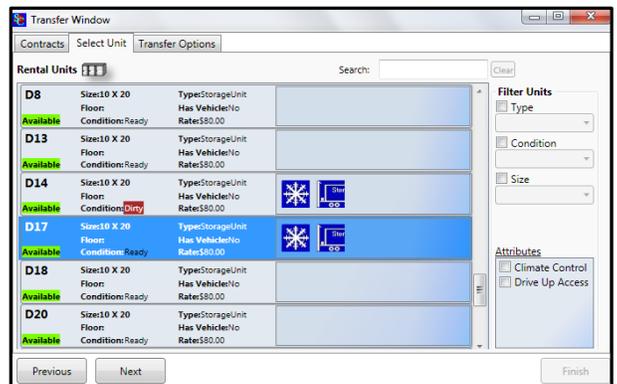
Click **Transfer** Button in the Button Bar, to open the Transfer Window come up.

Search for the person you are transferring. You have the option to search by unit number, customer name, and customer phone number.

Once the customer has been located in the list, click on the customers name to **Select** (highlight) the customer. Click **Next** to proceed.



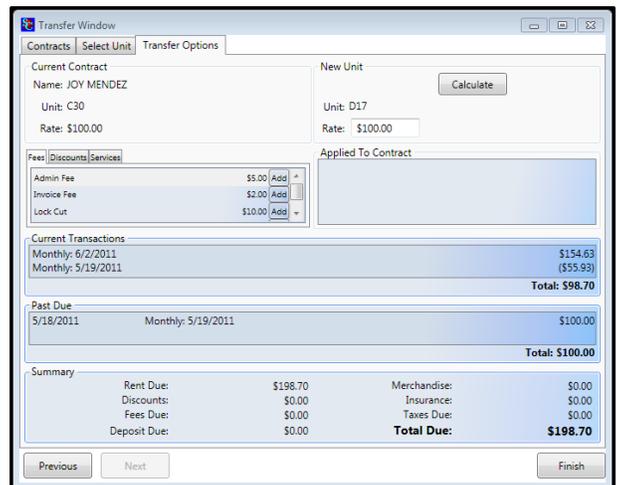
Select the Unit that you wish to transfer the customer to. Once selected the Unit will become highlighted. Click **Next** to Proceed.



In the **Transfer Options** screen click on the **Calculate** button to generate the total due for this transfer.

The **Current Transactions** section shows the prorated amount for the new unit, and the credit from the previous unit.

Click **Finish** to complete the Transfer.



Merchandise



Merchandise items, such as Boxes, locks, Shipping Tape, Bobble Wrap... can be inventoried and sold directly through a customer account, or through the Merchandise button in the tool bar for non-customers (street sales).

When a merchandise item is sold, it is removed from inventory decrementing the inventory count for the item sold. Reports within the Storage Commander program will itemize merchandise sales activity and generate re-order reports when inventory items reach a pre-defined re-order level.

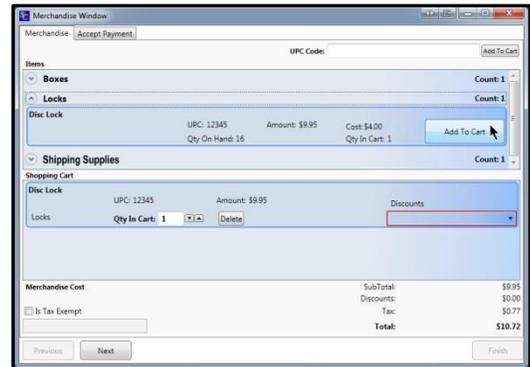
Selling Merchandise -Street Sales-

Click on the **Merchandise** button in the tool bar.

Select the item to be sold. Click on the **Add to Cart**, to place the selected item into the Shopping Cart

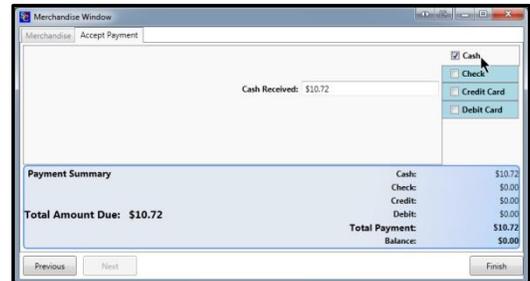
(Note, The quantity of an item can be increased or decreased by clicking on the up arrow (to increase) or down arrow (to decrease) located next to the Qty In Cart for the selected item).

Click **Next** to Proceed to the Accept Payment screen.



From the **Accept Payment** screen select the payment type (*in this example we will use Cash*). Once you check the box the total amount due appears in the **Cash Received** box.

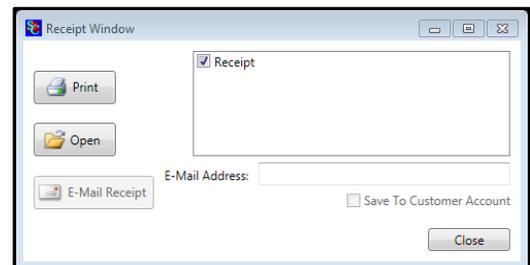
Click **Finish** to complete the transaction and proceed to the print receipt window.



In the **Receipt Window** click **Open** to view the a copy of the receipt.

Click **Print** to print a copy of the receipt.

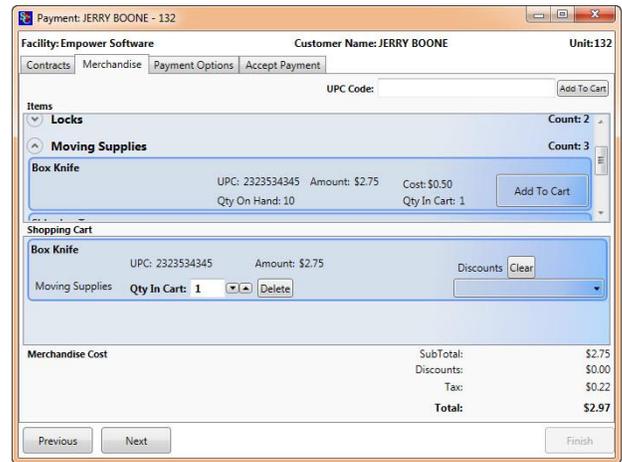
Once the documents have finished printing. Click **Close** to exit.



Selling Merchandise –Through a Customer Account

Selling merchandise while in a customer account has the added advantage of recording the merchandise sale in the customers history, providing you the ability of reviewing what merchandise items have been purchased by the customer as well as when they were purchased.

Merchandise sales can be included during a rent payment by clicking on the Merchandise tab in the Payment window. Select the merchandise items using the same method as described in the “Selling Merchandise Street Sales”. When the merchandise items have been selected, proceed through the **Payment Options** and **Accept Payment**, screens to complete the rent payment and merchandise sale.



Selling merchandise through a customer account without charging rent

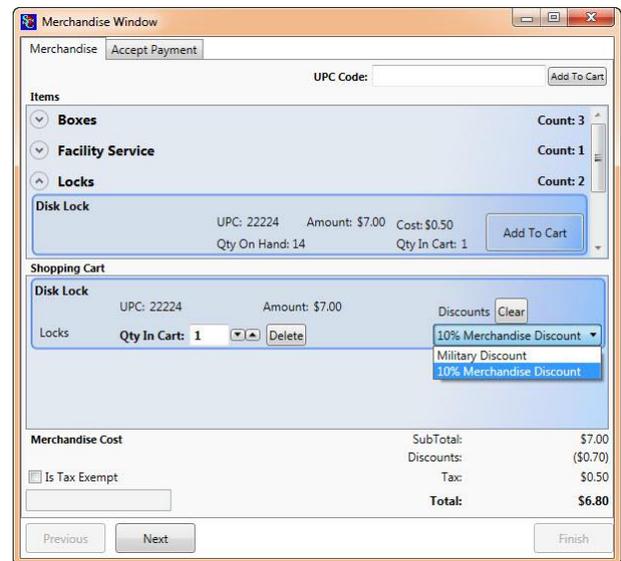
This procedure only applies to customers who are current (account balance is \$0.00)

In the **Payment Options** screen set the **Number Of Payments** to 0

Select the Merchandise tab and proceed to add merchandise to the sales transaction as referenced above.

Adding a Discount to a merchandise sale

Once an merchandise item has been added to the shopping cart, click on the **Discounts** pull down menu bar and select the appropriate discount item from the list. Once a discount has been selected it will be added to the merchandise transaction and displayed in the **Merchandise Cost** section at the bottom of the payment screen.



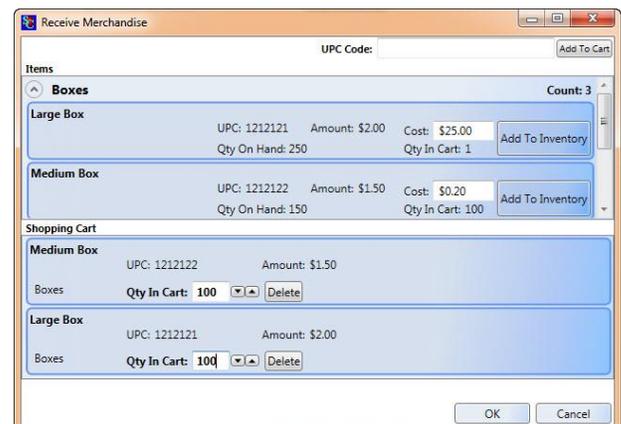
Receiving Merchandise

To receive inventory in to a facility click on the **Activities** pull down menu item located in the top task bar, and select **Merchandise / Receive Inventory**.

Select the merchandise item(s) that you are receiving into inventory.

Click on the **Add To Inventory** button and enter the number of items into the **Qty In Cart** box.

Click on the **OK** button to complete the process.



Adjusting Inventory

To make adjustments to inventory levels click on the **Activities** pull down menu located in the top task bar, and select **Merchandise / Adjust Inventory**.

Select the merchandise item to be adjusted, and click on the **Add To Inventory** button for that item.

In the **Qty In Cart** field enter the number needed for the adjustment. Entering a number to increase the inventory level and select **Found Inventory**, or enter a number proceeded with a minus sign (-) to decrease the inventory level and select **Lost Inventory**.

Enter an explanation in the **Explanation** field.

Adjust Merchandise

UPC Code: Add To Cart

Items

Boxes Count: 3

Large Box UPC: 1212121 Amount: \$2.00 Cost: \$25.00 Qty On Hand: 250 Qty In Cart: -50 Add To Inventory

Shopping Cart

Large Box UPC: 1212121 Amount: \$2.00

Boxes Qty In Cart: -50 Delete

Explanation: Pulled 50 Large Boxes from inventory due to water damage

Lost Inventory Found Inventory

OK Cancel

Account Adjustments



The adjustment function allows changes to be made against balances on a customer account.

Adjustments can be initiated through the button bar by clicking on the Adjustments button, or by right clicking on a customer's name and selecting **Details | Activities | Adjustment**.

Once an account has been selected the **Adjustment** screen will open. From here you will see a list of all account types that have a current balance (\$0 balances on account items will not be included in the **Past Due Items** list).

Adjustment Types

Adjustments are broken down into two types of adjustments, **Past Due Items** and **Account Adjustments**.

To reduce the balance on past due items, select the item and enter the offset amount into the corresponding field.

To increase a balance to an account item, select the item and enter the amount of adjustment into the Adjustment Amount field

Past Due Items

Past Due adjustments allow the reduction of all or a portion of the balance against the past due item selected in the list. Adjustments made against past due items are restricted to reducing the balance of the selected item only. You cannot enter an amount that results in the balance changing from a *balance due* to a *credit balance*. In addition you cannot enter a value that increases the amount due in this section of the adjustment screen. Go to the **Account Adjustment** section if you need to post an adjustment to an account that will increase the amount due

Account Adjustments

The Account Adjustments section of the adjustments screen allow global adjustments to be made on Rent, Tax, Deposit & Insurance balances. To increase the balance to any of these categories, select the category and enter the amount of the increase in the Adjustment Amount field.

The **New Balance** will automatically update indicating the result of all adjustments.

Enter an explanation for the adjustment and click on the Finish button to complete the adjustment

Processing Returned Checks

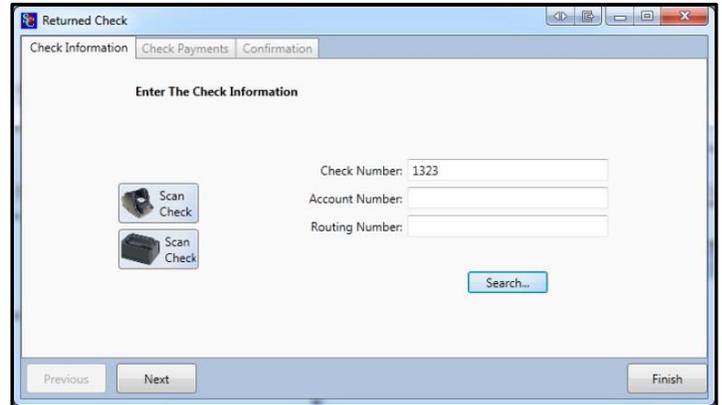


Initiating a returned check will cause Storage Commander to charge back to the customer account all items that were paid against the check being processed. When the returned check process has been completed, the customer account will be updated showing the charge backs, they will be placed in the appropriate late status, and their account history will be updated. The returned check activity will be recorded in the Facility Summary report.

Opening the Returned Check screen

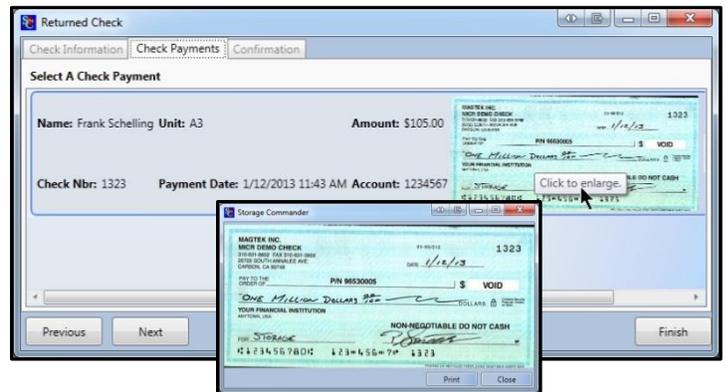
The Returned Check process can be initiated by clicking on the **Activities** pull down menu, or by clicking on the **Returned Check** button in the Button Bar.

Once selected, the **Check Information** screen will appear. Enter the search information, or if you have one of the approved check scanners, scan the check to proceed to the **Check Payment** screen.

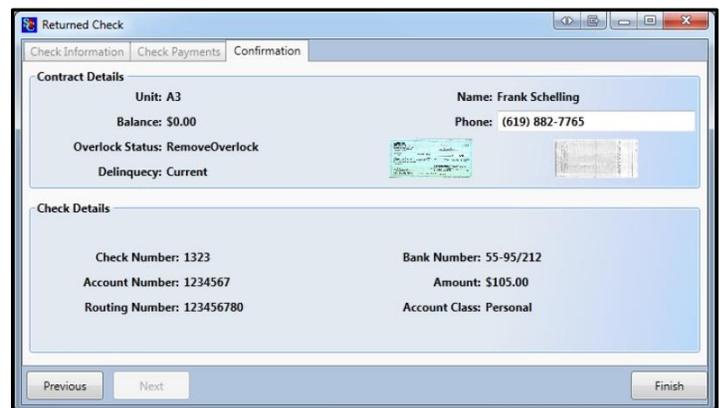


The Check Payment screen will show the details of the check being returned. If the check was initially processed using the Multipurpose scanner multipurpose scanner, you will be able to see an image of the front and back of the check. If you click on the image, you can view or print an enlarged copy of the check

Once you have verified that you are processing the correct check, click on the **Next** button to proceed to the Confirmation screen.



Once again verify that the correct check is being processed as a returned check. Click on the **Finish** button to complete the process.



Auction

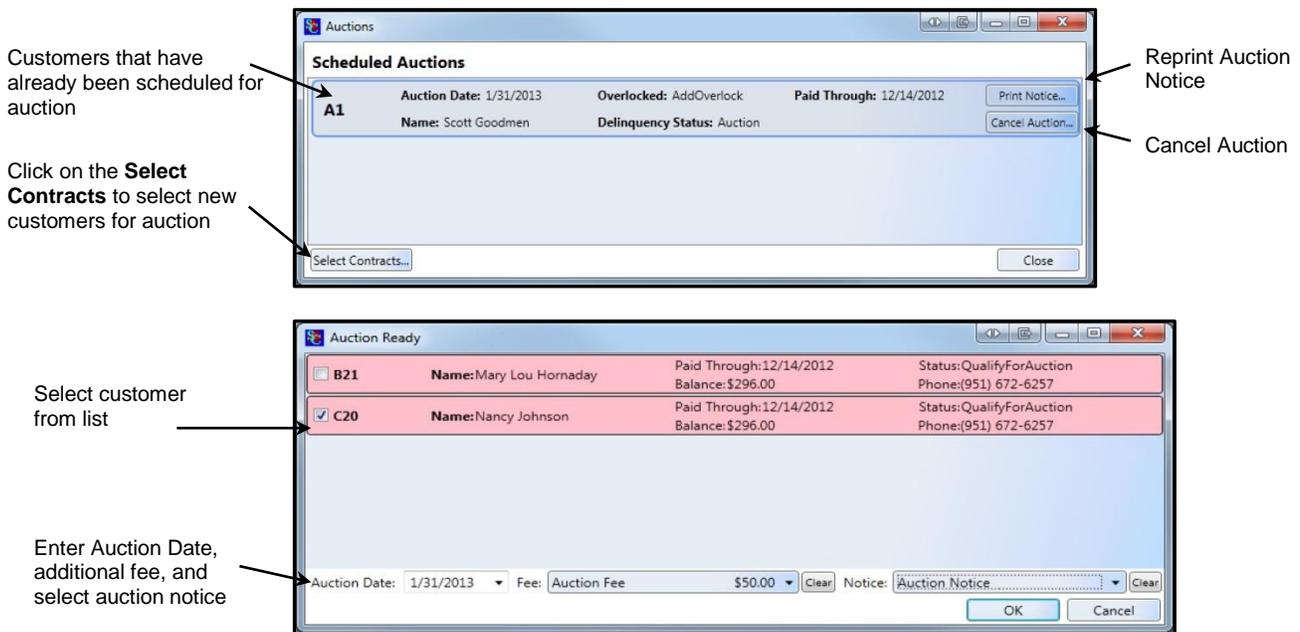


The Auction cycle is determined by the settings in the auction late step, which is setup in the **Configuration Manager** program. Once a customer is qualified for auction their unit will be listed in the **Quick View** screen under Late or Past Due Contracts, the **Site Map** will also indicate that they are in auction by changing their unit color to **ROSE** and including them in the **Auction** button in the legend bar.

Selecting Customer for Auction

Click on the Auctions button in the tool bar, or click on the Activities pull down menu and select Manage Auctions, to open the **Scheduled Auctions** window. This window will display a list of auctions that are already scheduled. To add a new customer to the auction schedule, click on the **Select Contracts** button at the lower left corner of this window. A list of customers that qualify for auction and are not currently scheduled for auction will appear. Select the customer(s) that you will be scheduling for auction, enter the **Auction Date**, add any additional auction **Fee**, and select the auction **Notice**.

When completed click on the OK button to print the Auction Notice



Reprint Auction Notice

Click on the Auctions button in the tool bar, or click on the Activities pull down menu and select Manage Auctions, to open the **Scheduled Auctions** window. Locate the customer in the list and click on the **Print Notice** button'

Cancel a Scheduled Auction

Click on the Auctions button in the tool bar, or click on the Activities pull down menu and select Manage Auctions, to open the **Scheduled Auctions** window. Locate the customer in the list and click on the **Cancel Auction** button'

Rate Change



The Rate Change function allows rental rates to be increased or decreased based on the size of the units, unit attributes, move-in date, last rate change, and location. In addition rate changes can be set to affect a single unit or a range of units, and can be configured to occur on a specific date, or automatically apply after a preset duration (annual rate change). Customers that are affected by the rate change but have pre-paid for their storage unit, can be exempt from the rate change until their pre-paid credit has expired.

Creating a rate change is a two-step process, wherein the details of the rate change are entered in the first step (**Create Changes**) and the units/customers who will be associated with the rate change will be selected in the second step (**Apply Changes**).

The rate change function only applies to rental units that are occupied. Changing the rate of unoccupied units is done in the **Configuration Manager** under **Company Setup / Facilities / Rental Units / Unit Size / Rates**. The unit price entered into this section will be considered the **Master Default Rate** for that unit size and configuration. Whenever a unit is vacated the rate for the unit will return to this rate.

A detailed explanation of the two steps involved is explained below.

Setup Rate Change

From the button bar click on the **Rate Change** button, you can also click on the **Activities** pull down menu and select **Rate Change**, to start the rate change setup process.

Create Changes

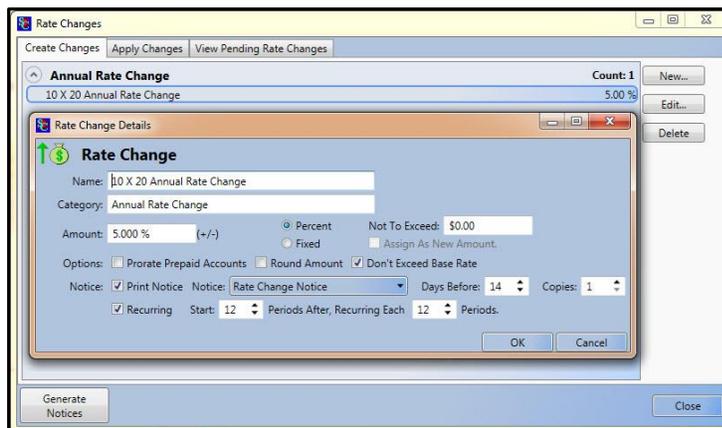
The first step in creating a rate change is to enter the details of the rate change. These would include:

- Naming the rate change** Name the rate change
- Entering a Category name** This will allow you to see rate changes broken down by category in the rate change report

Entering the Amount of the rate change

Enter the amount of the rate change into the **Amount** field. The amount can be set to Add (+) or Subtract (-) to the customers rental rate.

- As a Percentage of the current rate Increase or decrease rental rate as a percentage of rent
- As a fixed dollar amount Increase or decrease rental rates by a fixed dollar amount.
- Assigning the rate as a new amount The dollar value entered into this field will become the new rental rate.
- Not To Exceed value (Cap Rate) Will prevent the rate change from exceeding the dollar amount entered into this field.



Options

Prorate Prepaid Accounts

Used to configure the rate change to Prorate Prepaid Accounts. This function will charge the new rate on all units associated with the rate change. If some of the units have a pre-paid balance at the time of the rate change, the unit will be charged at the new amount at the time the rate change is activated. If this option is not selected, pre-paid units will remain at the old rate until their pre-paid balance has expired

Round Amount

Select to fix rental rates to a whole dollar amount (only used on percent based rate changes)

Don't Exceed Base Rate

Will not allow the rate to exceed the base rate (**Master Default Rate**) of the unit.

Notice

Select to print notice (x) days prior to the effective date of the rate change

Setting up Recurring Rate Changes

To configure a rate change to automatically apply to selected accounts at predetermined time intervals (*every 12 months*), select Recurring and enter the number of months before the rate change is to go into effect, into the **Start** field. Enter the time duration between auto rate changes into the Recurring Each Periods field.

For example: To create a recurring rate change that goes into effect 12 month after the move-in and reapplies itself every 12 months, enter the number 12 into the Start field and the number 12 into the Recurring Each Periods field.

Apply Changes

The second and final step in the rate change process is to assign the rate change to a customer/contract. The rate change process allows you to configure the rate change so as to have it apply to customers/contracts based on a very specific set of conditions.

The screenshot shows the 'Rate Changes' application window with the 'Apply Changes' tab selected. The facility is 'Empower Software'. The rate change to apply is '10 X 10 Rate Increase' with a rate of '\$3.00'. Match criteria include Size: '10 X 20', Rate: '\$0.00' (Lower selected), Move In: '3/31/2014' (Before selected), and Last Change: '5/27/2014' (Before selected). Attributes include Campground, Cell Tower, Climate Controlled, Container Storage, Drive Up Access, and Handicap Access. Matching units are listed in a table:

Name	Rate	Last	Unit	Details...
<input checked="" type="checkbox"/> JANEL BARRETT	\$120.00		90	Details...
<input checked="" type="checkbox"/> PHILL D. CONNER	\$120.00		93	Details...

Apply To Units: Apply Effective Date: 6/30/2014 Select All Clear All Remove All

Generate Notices Close

Assigning Customers to a Rate Change

Start by clicking on the **Apply Changes** tab to match customers up to a specific rate change, you must first select the rate change that was developed through the **Create Changes** function discussed previously. In the **Rate Changes To Apply** field click on the down arrow to open a list of available rate changes. Select one of the rate changes from the list. After a rate change has been selected the next step would be to setup the Match Criteria

Match Criteria

The rate change feature allows you to use the computer to locate customers who are occupying a specific unit configuration

Size	Click on the down arrow in the Size field to open a list of all available unit sizes
Rate	Enter a base value into the Rate field to qualify the rate change to occur on rental rates above or below the value entered into this field.
Move In	Set the rate change to only apply to customers who moved in Before or After the date entered into this field
Last Change	Limits the rate change to affect only customers who's last rate change was before or after the date indicated in this field.
Building	Enter a building id to assign the rate change to units within a specified building
Floor	Enter a floor id to assign the rate change to units within a specified floor
Attributes	Constrain the rate change to units supporting specific attributes

After the **Match Criteria** has been entered, click on the **Search Contracts** to populate the **Matching Units** with the customers/contracts that fall within the rate change parameters

Manually adding customers to a rate change

Additional customers can be manually added to the rate change by clicking on the **Add Contracts** button to display a list of all customers. Select a customer from within this list. To select more than one customer at a time, hold the Ctrl down while clicking on customers in the list.

It is important to know that manually adding customers to the rate change allows you to add customers that do not fall within the parameters that were setup for this rate change.

Effective Date

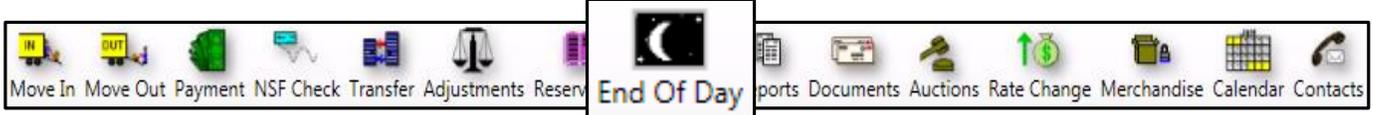
Enter the implementation date for the rate change

Apply To Units

Click on the **Apply** button to apply and save the rate change.

Running End Of Day

Running end of day initiates many processes within the Storage Commander program, which include; charging

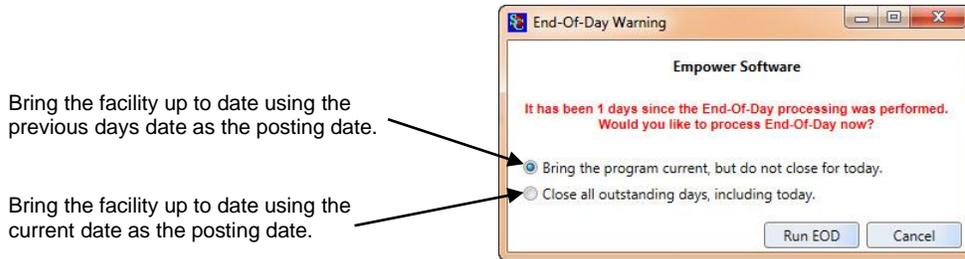


rent, initiating Auto Credit Card & ACH payments, Late Notices, Late Fees, Report Groups, as well as system level routines.

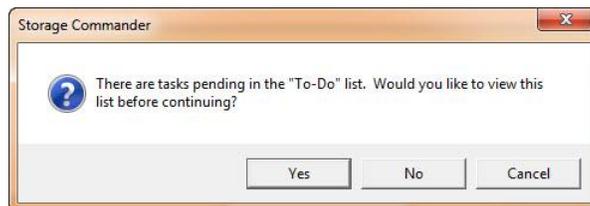
The advanced functionality built in to our end of day processes allow you to run end of day while using the Storage Commander Management system. In other words you can start the end of day process, let it run in the background while you continue to take payments, move-in, move-out, or any other management function while the end of day is running.

When starting Storage Commander the program will automatically detect if the end of day routine is up to date. If it detects that the Storage Commander system is not up to date it will display a message box similar to the example below informing you that the facilities management system is not current and has not been current for the number of days indicated within the message box. If this occurs you will be asked to bring the management system current leaving the current day open (this will allow rent to be charged, late steps/fees to be assessed, auto credit cards to be charged, invoices to be printed/mailed as well as all other end of day functions to be processed as of the day prior to the day this processes (End Of Day) was initiated.

If you select the second option (Close all outstanding days, including today). Once again, this will initiate all end of day process with a posting date of the current system date.

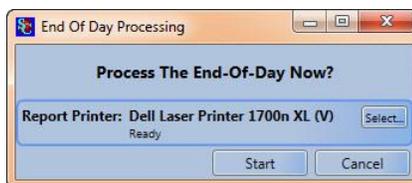


When you click on the End Of Day icon in the tool bar the program will look to see if there are any outstanding actions in the systems To Do list. If it detects that there are action items that need to be reviewed prior to closing the facility a message box will be displayed allowing you to interrupt the end of day process so that you can review the action items.



Starting End Of Day

To start the End Of Day process click on the End Of Day icon in the tool bar. The program will automatically select the Windows default printer and let you know if it is Ready or Off-Line. If you would rather use a different printer, click on the Select button and select a printer from the list of available printers.



Printing Notices

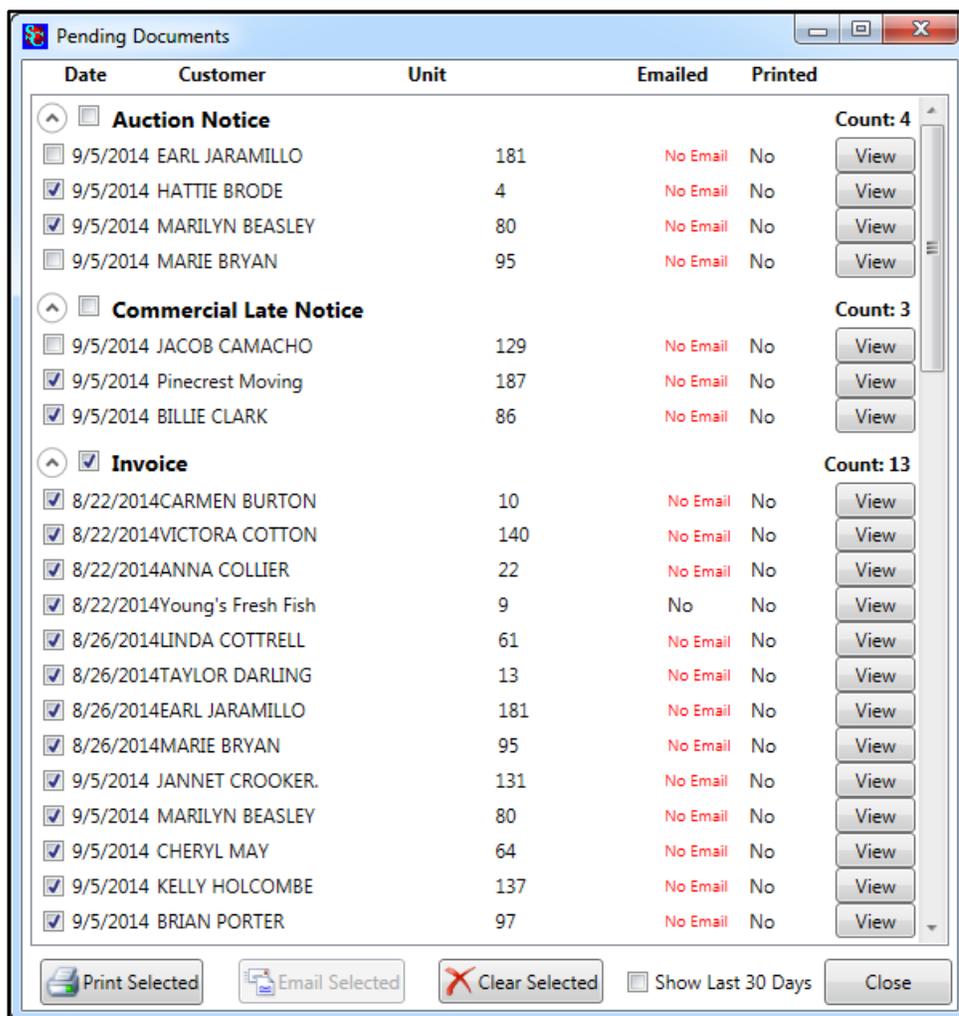
During the end of day process, notices (such as: late notices and invoices) are generated and passed to the Pending Documents folder where you can review and select the documents prior to printing or emailing.

Notices will remain in the Pending Documents folder until they are processed or cleared from the list. You can review and reprint any notice that has been generated over the past 30 days (even if the document or notice has been processed) by clicking on the Show Last 30 Days check box located at the bottom of the Pending Documents screen.

Selecting Notices to Print, Email or Clear from the list

To select individual customers click on the check box adjacent to the customer name.

To select all customers attached to a specific notice, click on the check box next to the notice.



Creating a Contact

The Contacts feature allows Storage Commander to track potential customers who have contacted the facility and expressed an interest in renting a space. Through this feature you can enter the customers contact information as well as gather important information on how the customer located your facility and what their storage space needs are. Once this information is entered into the system you can refer to the Marketing and Contact reports to help guide you through more effective management of your facility.



To start this process click on the Contacts button in the tool bar. A contacts list box will open displaying a list of open contacts.

To add a new contact click on the **New** button. Enter the customer information as represented on the screen.

Special Note: Entering the zip code will automatically populate the City and State fields.

Proceed to the **Requested Unit** tab and select the type and size and features of the unit the customer is looking for.

Type	Unit Size	Price
Standard Storage	10 X 20	\$120.00
	5 X 5	\$45.00
	5 X 10	\$70.00
	8 X 12	\$95.00
	10 X 10	\$90.00
	10 X 20	\$120.00
	12 X 25	\$110.00
	12 X 30	\$145.00
	12 X 35	\$400.00
	20 X 20	\$210.00
	Cell Tower	\$1,700.00
	60 X 200	\$1,200.00

Displays a list of features that are available at the facility. This list is created in the Configuration Manager under *Company Setup / Facilities / Facility Features*

Click on the down arrow to open a list of Unit Types (such as standard storage units, RV parking, Portable Storage units etc....). Unit types are created in the Configurations Manager under *Company Setup / Rental Units / Unit List / Edit Unit Types*

The Contact Info screen allows you to record specific information concerning a potential customers storage selection decisions as well as how the potential customer found out about your facility.

All of the fields in this screen have a down arrow located at the extreme right side of the field, click on this arrow to open the selection list box for the field. The selections contained in each field can be edited or new selections can be added through the Configuration Manager under Contact Data.

New Inquiry

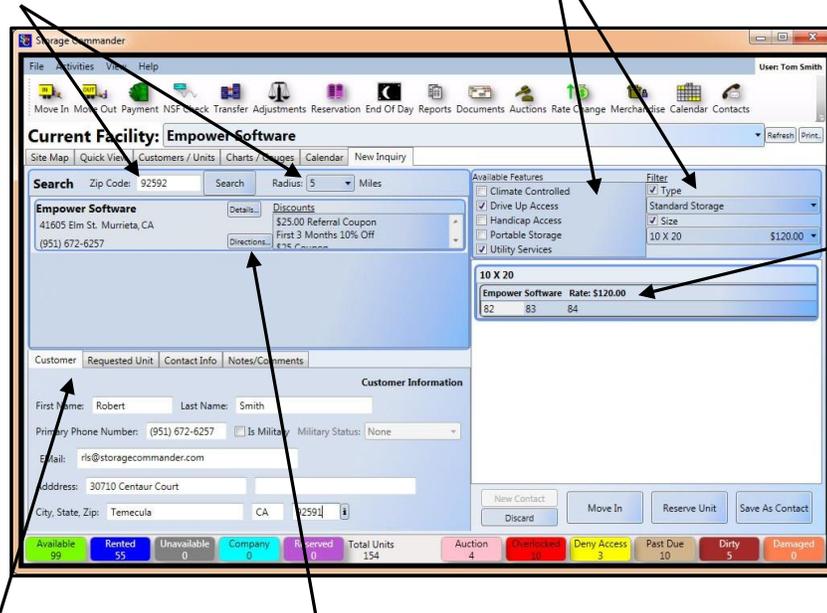
The New Inquiry screen allows the site manager to quickly locate a storage facility within a specific distance of a customers location. This is especially useful for multi facilities owners or management companies, as the storage facilities that are listed within the search radius are limited to company or managed properties.

Once a storage facility within the search radius is located, the Features, Available Units and Unit Types for the selected storage facility are displayed.

When the customer information for the New Inquiry has been completed, and you have selected the **Unit, Unit Features, and Unit Size** you can select to Move the customer in, Reserve the unit or add the customer to the New Contacts list.

Enter the customers zip code, followed by the driving radius to locate all facilities storage facilities within that radius.

Select the Features, Unit Type, and Size of unit

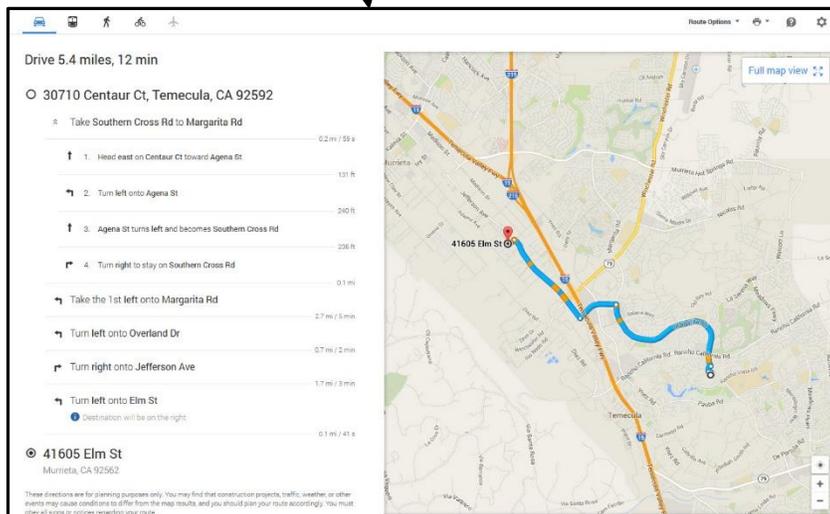


A list of available units that meet the selected criteria will be displayed

Select how you would like to handle this customer

Fill in the contact information

Once the Customer Information (address) has been filled in, click on the **Directions** button to create a turn by turn map that can be emailed to the customer



Calendar

The Calendar feature provides a powerful tool to help you run your facility. To open the calendar click on the Calendar icon in the tool bar, or select the Calendar tab on the main screen.

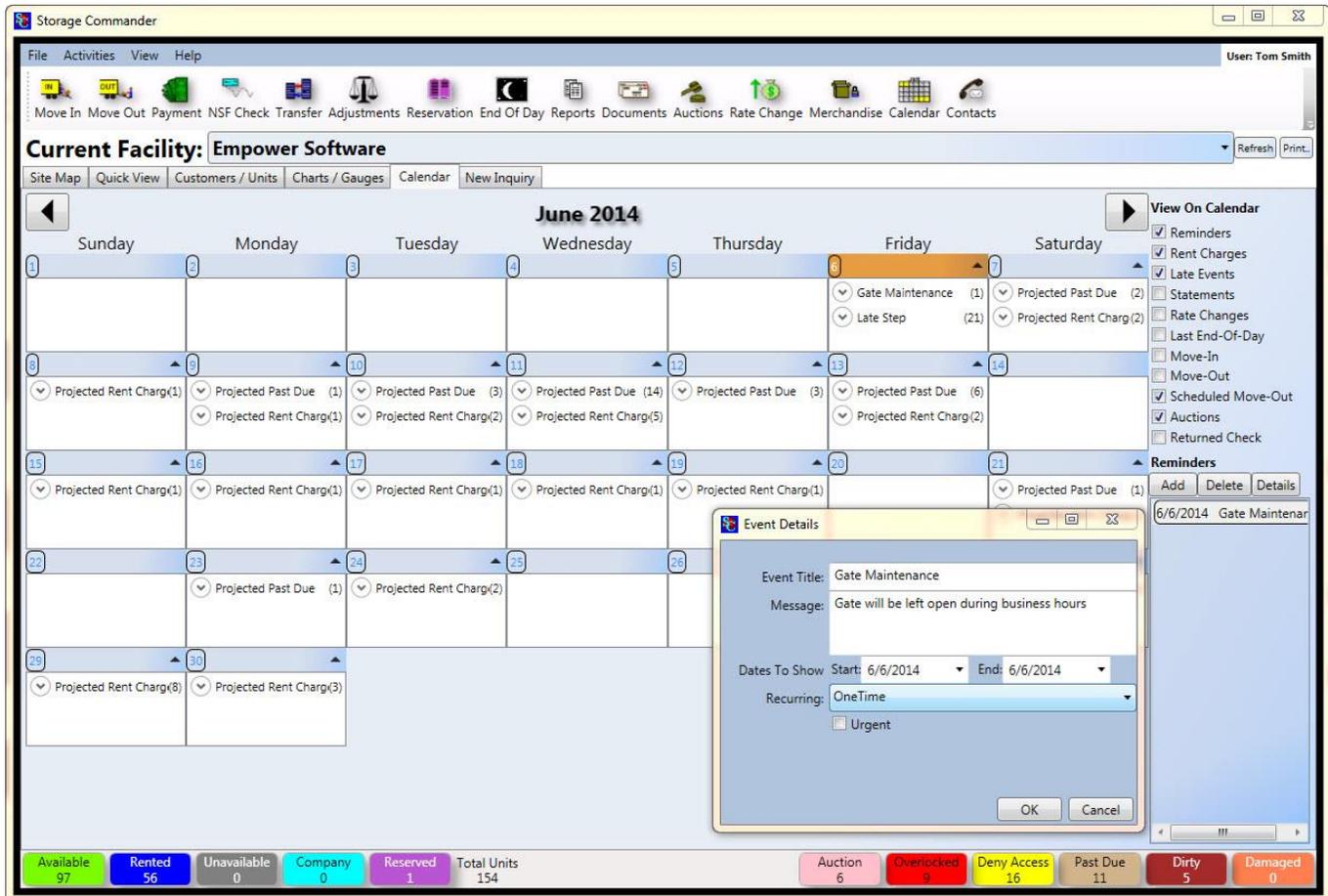


The calendar is arranged so as to give you a quick view of events that have happened in previous months, the current month or scheduled events for future months.

To move from the current month to a month in the past, click on the left arrow located at the top of the calendar, to show future months click on the arrow located at the right of the calendar. To view events that are scheduled in the month shown in the calendar page, or to view events that have already occurred, select the event you wish to view from the list of calendar events located on the right side of the calendar window. Once you have selected the events you will see them populated in the calendar. If you click on an event within a calendar day a list of customers that are affected by the event will open allowing you to double click on a specific customer to open their detail page



Adding a System Reminder



- To add a **Reminder** please follow the instructions included below
 - **Step 1:** On the Calendar click the **Add** button under Reminders. The Event Details screen will launch.
 - **Step 2:** Enter the title under **Event Title** and the details about the Reminder, under the **Message** Section.
 - **Step 3:** Set the Date information under the **Dates to Show** section.
 - **Step 4:** If the Reminder is recurring set how often it reoccurs under the **Recurring** Section. Otherwise its best left set to **OneTime**.
 - **Step 6:** If the **Urgent** box is checked a red exclamation point will appear next to the Reminder. Click **OK** to create the Reminder.
 - **Step 7:** Once you create the Reminder it should appear in the **Reminders** Section on the calendar.
 - **Step 8:** To View the Reminder on the Calendar click **Reminders**, under **View on Calendar**
 - **Step 9:** On the **Calendar** the Reminder should appear under the day it was set for. The **Arrow** next to the title of the Reminder can be clicked to expand for more information.
 - **Step 10:** To add or remove information from the Reminder, double click on highlighted title. This will launch the Event Details screen, and allow editing of the Reminder.

Reports

All reports are accessed from the Tool Bar by clicking on the **Reports** button.



Once the Reports function has been selected the reports management window will open. From this window you can open and view reports by selecting the appropriate category and clicking on the View button associated with the report. Any number of reports can be opened at one time, when you select a report a tab will appear at the top of the reports window signifying the report has been opened.

Some of the more advanced features include: Ability to generate any report in the system against a facility customer rather than the entire facility. Span reports across multiple facilities. Perform a data search within a report. Export reports to different file formats, such as PDF, Excel, CSV as well as many other file formats.

Reports are broken down by category. Click on the appropriate category to open a list of reports contained in the category

Report Groups (created in the Configuration Manager under Accounting / Reports) contain selected reports to be managed under a group name for automatic generation covering a pre-determined date range.

Reports can be generated spanning one or more facilities.

Reports can be generated to reflect a single customer by clicking on the **Selected Contact** button and selecting the customer.

The Tabs will show all reports that are currently open

To quickly find a customer in a multi-page report, click on the **Find Text** icon and enter the name of the customer

Click on the **Forward** and **Back** buttons to move through a multi-page report

Select the date range to be used in generating the reports. Use **Other** if you need the reports to cover a specific date range.

Click on the **Export** button to export and save the report to a different file format.

Click on the **Print** button to print the report

Documents Feature



All document that have been automatically generated through the Storage Commander program will be displayed in the **Pending Documents** window. When opened this window will list all documents that have been generated from the last time End Of Day was ran, and are considered active notices. To see all documents that have been generated over the past 30 days, click on the **Show Last 30 Days** selection box (located at the bottom of the Pending Documents window).

All documents are arranged by category, selecting the check box to the left of the category name will select all documents under that category, whereas selecting the check box next to an individual's name within a category will limit the selection to only individuals whom you have placed a check mark in their selection box

Once the selection process has been completed you have the option of **Printing** the selected documents, **Emailing** the selected documents, or **Clearing** all selected customers.

Viewing Documents & Notices

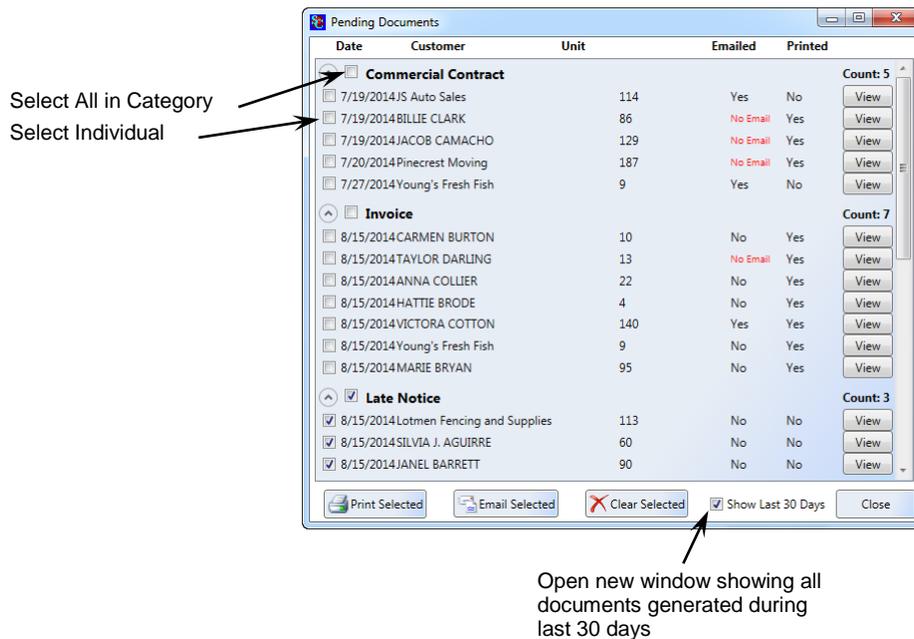
Click on the View button to open the document using you pdf reader. You do not need to select a document to view it.

Printing Documents & Notices

Referencing the information above, when printing selected customer documents, once the document is printed it will be removed from the active document list. To see or to reprint the document using the Documents feature, click on the Show Last 30 Days

Email Documents & Notices

Emailing documents works in much the same was as printing documents, wherein you select the customer you wish to email documents to, once selected click on the **Email Selected** button to initiate the email process.



A red **No Email** notice signifies no email address has been entered into the customer account information. To add an email address to a customer account go the **Contacts Details** screen for the customer and select the **Customer** button, when the customer information screen opens , enter the email address in the **Email** field.

Generating Documents & Notices

The Generate Documents function allows you to generate documents outside the normal process of automatically creating and printing the documents in the program. For instance, through the Generate Documents functions you can create an Invoice for a customer at any time without waiting for the normal invoicing cycle, you could also use the same process to generate a late notice, NSF notice or even create a letter for mass mailing or emailing to all or part of your active and/or inactive customers.

Manually Generate a Notice

To manually generate a notice (such as late notice, invoice, auction, or other notices), click on the **Activities** pull down menu item and select **Generate Documents**. This will open the **Generate Notices** Window, select the customer by locating the customer in the **Contracts** column. Once the customer (or customers) have been selected locate the notice to be generated from the **Notices** column. You can preview the notice by clicking on the **Generate Notice** button and selecting **View** located to the right of the customer name. To print or email the notice select the customer by clicking on the check box next to the customer name followed by selecting the appropriate Print or Email button at the bottom of the screen

The screenshot shows the 'Generate Notices Window' with two main columns: 'Contracts' and 'Notices'. The 'Contracts' column lists various customers with checkboxes. The 'Notices' column lists different document types like 'Late', 'Invoice', 'Receipt', etc. Annotations point to the 'Include inactive' checkbox, the 'Generate Notices' button, and the 'View' button next to a customer name.

Customer selection column

Notice selection column

Select **Include Inactive** to add inactive (moved-out) customers to the list

Click on the Generate Notices button to open the **Generate Documents** print selection screen

Click here to pre-view the document

Date	Customer	Unit	Emailed	Printed	
<input type="checkbox"/>	9/3/2014 HATTIE BRODE	4	No Email	No	View
<input checked="" type="checkbox"/>	9/3/2014 Young's Fresh Fish	9	No	No	View
<input type="checkbox"/>	9/3/2014 MITTIE P. BERTHIAUME	14	No Email	No	View

Creating and Printing Letters

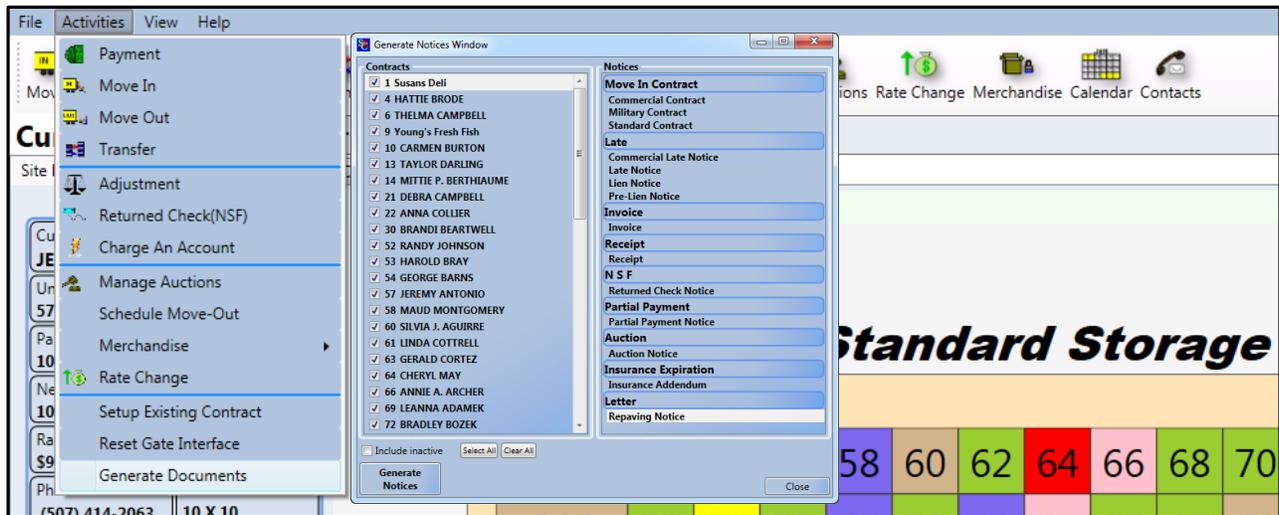
Letters can be created and delivered to your customer base as an email or as a printed letter. You have complete control over who gets the letter (all or any number of customers). You can direct the letter to active customers, as well as inactive customers (tenants who have moved out) or both.

Creating Letters

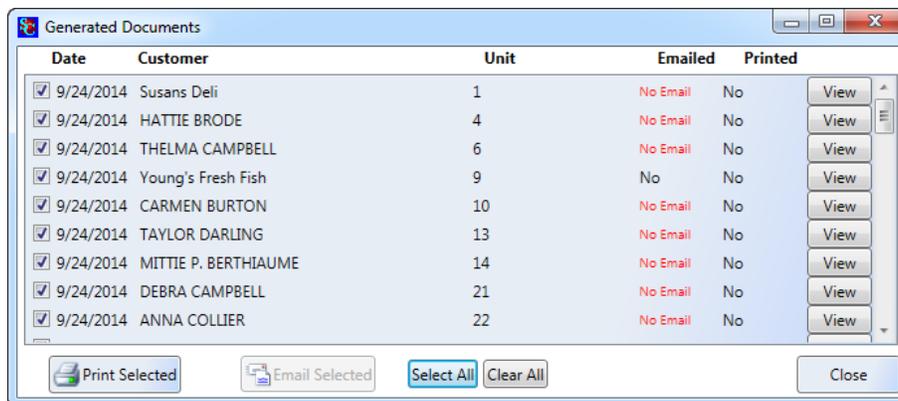
A letter can be created within Storage Commander through our integrated word processor or by using Microsoft Word to create the letter. If you choose to use Microsoft Word to draft the letter, you will need to import the letter after it is drafted into the integrated word processor in Storage Commander to add any merge fields into the document. For instructions on how to create letters and notices through our integrated word processor, please refer to the Configuration Manager manual under the section “Notices”

Selecting Customers

From the **Activities** pull down menu, select **Generate Documents** to open the Generate Notices Window. From



this window you can select individual Contacts (Customers) or you can click on the **Select All** button to select all customers in the list. Next you will select the **Letter** category from the **Notices** column and select the appropriate letter from this category. When the letter and customers have been selected click on the **Generate Notices** button to create the letters and move them to the **Generated Documents** window.



Select the customers to print or email the letter to, or click on the **Select All** button to select all of the customers in the list. You can preview the letter prior to printing or emailing by clicking on the **View** button for a specific customer.

When you are ready to print or email the letter, click on the appropriate button at the bottom of the screen.

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